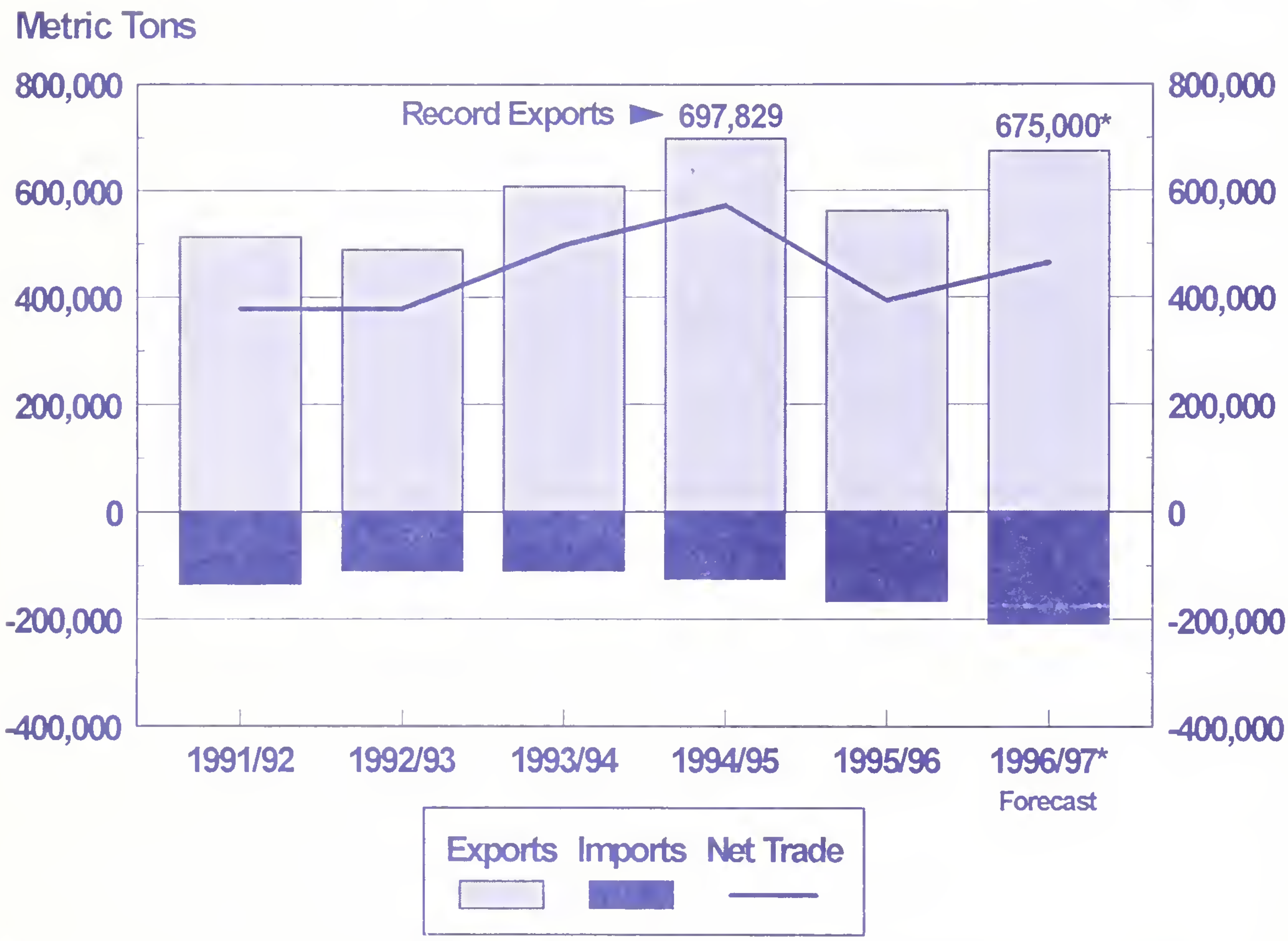
United States Department of Agriculture

Foreign Agricultural Service

Circular Series FHORT 03-97 March 1997

World Horticultural Trade and U.S. Export Opportunities

Strong Recovery Forecast for U.S. Apple Exports in 1996/97



Source: U.S. Department of Commerce, Bureau of the Census
Marketing year is July-June

U.S. apple exports are expected to recover in marketing year (July-June) 1996/97 after falling sharply in 1995/96. Exports in 1996/97 are forecast at 675,000 tons, a near-record, 20 percent above 1995/96 shipments. A larger Washington apple harvest, reduced competitor supplies, likely strong demand in leading markets, and ongoing USDA Market Access Program activities, have improved U.S. apple export expectations in 1996/97. Also, the United States has reached several technical agreements which should improve access to important markets. Asian countries will continue to boost U.S. export performance in 1996/97. From July to December 1996, apple exports to Taiwan, the top U.S. market, totaled 75,557 tons, 22 percent above shipments during the same time period in 1995. Ample supplies of U.S. Fuji, combined with the recent recovery of Taiwan's economy, will keep exports strong to this country. Canada, Mexico, and Brazil are also expected to be strong markets.

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ANALYSIS

Sam Rosa	202-720-6086	Fresh deciduous fruit, apple juice, olives, stone fruit, and CBI
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Bill Janis	202-720-0897	Fresh and processed potatoes, tree nuts, and tropical fruits
Bob Knapp	202-720-4620	Canned deciduous fruit and kiwifruit
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, melons, bananas, nursery products, and cut flowers
Debra A. Pumphrey	202-720-8899	Coffee, cocoa, tea, spices, essential oils, ginseng, and trade forecasts
Stephanie Riddick	202-720-9792	Dried fruit, avocados, beer, hops, berries, and circular coordinator
Joe Somers	202-720-2974	Situation and outlook group leader, processed citrus, trade forecast coordinator, FAO citrus liaison, and circular editor
Debbie Seidband	202-720-6877	Sugar, honey, and fresh citrus
Yvette Wedderburn Bomersheim	202-720-9903	Wine and brandy, table grapes, GSM-102 export credits, NAFTA coordinator and supplier credits

MARKETING

Ted Goldammer	202-720-8498	Fresh citrus and products, hops, berries, wine, brandy, and potatoes
Pamela McKenzie	202-720-8495	Canned deciduous fruit, grape juice, cranberry juice, kiwifruit, and honey
Stacey Peckins	202-720-5330	Tree nuts, papaya, foliage, plants
Steve Shnitzler	202-720-8495	Dried fruit, avocados, tomatoes, vegetables, ginseng, and deciduous fruit

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Export Summary

U.S. exports of horticultural products to all countries in December reached $787.7 million, up 1 percent from the same month a year earlier. Six out of 15 categories of horticultural exports registered increases. Categories with the most significant increases in December were miscellaneous products (up $37.2 million or 22 percent); dried fruit (up $3.3 million or 11 percent); and wine (up $2.2 million or 10 percent). The categories with the most significant decreases were fresh non-citrus fruit (down $16.4 million or 17 percent); fruit and vegetable juices (down $8.9 million or 17 percent) and fresh vegetables (down 6.4 million or 7 percent). During the first 3 months (October-December) of fiscal year (FY) 1997, the total value of U.S. horticultural exports was $2.78 billion -- 6 percent above the same period last year.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds, 1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTEO HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER - SEPTEM8ER YEAR
OEC 1996

NAME	QUANTITY					VALUES (1000 DOLLARS)				
GROUP & COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MON LAST YR	CURR MON CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH CITRUS MT										
GRAPEFRUIT	33,308	30,674	123,950	105,839	497,339	15,922	15,380	64,008	54,317	258,858
LEMONS	11,933	11,345	33,001	33,868	132,269	9,644	11,749	33,004	35,806	114,653
ORANGES, INCL. TM	38,376	37,235	78,257	75,840	513,630	20,470	20,720	45,063	43,104	287,699
OTHER CITRUS	5,994	3,650	11,617	10,593	30,208	5,798	2,532	10,384	8,604	24,774
Subtotal:----	89,611	82,904	246,825	226,140	1,173,446	51,834	50,381	152,459	141,830	685,985
FR. FRUIT, NON-CIT MT										
APPLES	64,417	63,087	195,861	221,557	564,953	41,320	38,678	123,907	134,161	371,337
AVOCADOS	351	618	2,941	2,174	10,090	309	559	2,136	1,784	12,342
CHERRIES SWT &TRT	1,405	935	3,144	1,310	34,702	1,738	817	3,174	1,346	130,807
GRAPES	26,046	11,817	104,847	79,758	240,097	30,742	18,522	128,895	118,908	303,291
KIWIFRUIT	362	478	989	1,454	5,315	495	683	1,367	1,882	7,378
MELONS	3,899	4,262	20,167	20,066	223,273	1,971	2,408	10,069	10,060	80,607
PAPAYA	716	588	2,063	1,805	8,274	1,632	1,439	4,505	4,370	19,100
PEACHES & NECTRNS	164	293	1,296	2,269	74,822	222	352	1,172	1,938	71,900
PEARS	19,781	12,013	69,186	58,699	144,426	10,765	7,544	36,314	34,946	84,460
PLUMS/PRUNES	303	74	2,062	1,876	67,193	296	116	2,125	1,862	60,698
STRAWBERRIES	584	778	6,760	5,698	53,693	1,800	2,727	16,604	15,017	91,674
OTHER NON-CITRUS	3,121	3,855	14,104	17,123	47,787	3,082	4,118	14,226	17,565	62,554
Subtotal:----	121,148	98,797	423,420	413,789	1,474,624	94,371	77,963	344,494	343,839	1,296,148
CAN/PREP FRUIT MT										
CHERRIES, TART CN	880	331	1,638	912	6,270	1,034	456	1,859	1,283	7,406
FRUIT MIXTURES	1,935	1,422	8,276	6,736	26,876	2,201	1,617	9,463	7,979	31,614
MARACHINO CHERRY	479	293	2,997	1,194	7,756	910	605	4,058	2,532	13,925
PEACHES, CANNED	1,306	928	4,942	4,215	17,777	1,198	895	4,487	4,252	17,250
PINEAPPLE, CANNED	221	370	836	922	3,339	202	338	723	862	3,113
OTHER CANNED FRUI	3,617	3,557	11,060	11,454	45,596	4,295	4,016	13,121	13,491	52,142
OTHER PREP/PRESER	5,123	5,725	16,842	17,622	77,272	5,669	5,993	19,239	20,501	78,708
Subtotal:----	13,562	12,626	46,591	43,055	184,885	15,509	13,919	52,949	50,899	204,158
ORIEO FRUIT MT										
PRUNES, ORIED	4,264	5,344	16,666	18,277	62,548	9,674	10,801	38,055	38,118	139,073
RAISINS, ORIED	9,045	10,903	32,121	36,812	118,824	15,691	18,186	55,210	63,357	200,420
OTHER ORIEO FRUIT	1,962	1,648	8,174	6,387	22,411	4,875	4,572	18,984	18,744	55,474
Subtotal:----	15,271	17,895	56,961	61,475	203,783	30,240	33,559	112,249	120,220	394,967
FROZEN FRUIT MT										
BLUE8ERRIES, FROZ	414	289	2,366	1,809	13,785	632	610	3,661	3,561	18,713
STRAW8ERRIES, FRO	1,526	1,011	4,724	4,096	21,890	1,973	1,329	6,166	5,289	28,346
OTHER FROZEN FRUI	1,697	1,413	7,723	4,583	28,612	2,536	1,458	9,397	5,933	36,707
Subtotal:----	3,637	2,714	14,814	10,487	64,287	5,141	3,396	19,224	14,783	83,766
FRUIT/VEG JUICES KL										
GRAPEFRUIT JU, CN	3,703	3,206	9,733	11,352	63,393	2,615	2,275	7,087	7,505	43,790
ORANGE JUICE, CON	21,152	14,114	55,995	49,564	326,175	13,802	10,080	34,278	33,642	163,945
ORANGE JUICE, NOT	14,213	14,445	34,623	43,534	152,862	9,948	9,961	24,974	30,252	109,185
OTHER JUICES	39,381	28,062	141,670	105,877	489,240	26,284	21,367	92,279	74,805	348,225
Subtotal:----	78,449	59,827	242,020	210,326	1,031,670	52,649	43,683	158,618	146,205	665,145
FRESH VEGETA8LES MT										
ASPARAGUS, FR, CH	191	216	444	477	14,344	640	678	1,268	1,391	51,666
8ROCCOLI	13,833	11,372	31,299	28,274	129,396	7,193	6,955	17,677	18,289	84,418
CAULIFLOWER	9,670	7,769	26,474	24,597	107,457	6,302	5,068	16,530	15,981	71,619
CELERY	12,728	11,994	30,104	30,213	116,728	3,940	4,863	10,700	11,457	38,886
LETTUCE, FR CHLO	26,491	27,319	75,947	80,318	286,294	10,679	11,587	31,819	38,725	132,876
ONIONS	33,492	22,179	96,368	93,983	266,097	9,426	7,874	27,367	32,048	83,413
PEPPERS	4,974	5,532	13,760	15,730	58,504	3,498	4,124	10,670	12,555	46,467
TOMATOES	11,421	12,115	34,145	36,870	131,285	11,889	9,150	29,671	28,957	100,428
OTHER VEGETA8LES	51,853	44,681	125,419	122,047	681,271	32,994	29,824	88,072	92,303	369,553
Subtotal:----	164,654	143,175	433,961	432,509	1,791,376	86,561	80,124	233,774	251,707	979,327
VEG CANNEO MT										
KETCHUP	3,944	3,308	10,806	10,755	41,143	2,839	2,505	7,946	7,964	30,851
SWEET CORN, CANNE	14,505	16,393	41,932	50,906	168,615	11,390	13,058	32,938	41,498	136,983
TOMATO PASTE	6,360	7,958	28,417	29,326	101,059	5,597	5,834	22,312	22,005	77,393
TOMATO SAUCE	6,854	5,882	20,028	21,365	84,053	6,582	5,542	19,387	20,300	79,868
OTHER CAN VEG	21,314	18,405	62,711	64,245	253,825	26,786	27,592	78,960	84,453	315,358
Subtotal:----	52,976	51,946	163,894	176,597	648,696	53,194	54,531	161,544	176,218	640,453
FROZEN VEGETA8LES MT										
FROZEN FRENCH FRY	26,102	29,403	81,993	94,595	350,487	19,190	21,417	60,575	69,700	256,185
FZN SWT CORN	4,936	3,862	16,699	14,773	59,253	4,161	3,317	14,082	12,882	50,829
OTHER POT FZN	1,638	2,472	4,926	10,047	20,772	1,230	1,730	3,864	6,416	17,868
OTHER FZN VEG	5,183	4,503	18,081	16,521	71,480	4,723	4,325	16,940	15,639	63,306
Subtotal:----	37,859	40,240	121,698	135,935	501,991	29,303	30,789	95,461	104,638	388,188
VEG, DEHYD MT										
GARLIC DEHYD.	832	1,059	2,244	3,013	9,622	1,894	2,246	5,168	6,341	21,690
ONIONS, OEHYO.	2,951	2,415	8,041	8,125	30,465	6,614	5,470	18,744	19,179	70,479
POTATOES, DEHYD	6,236	4,235	15,348	11,904	50,241	5,666	4,371	14,749	12,375	57,054
OTHER DEHYO VEG	3,993	5,841	12,926	16,632	55,708	6,129	8,179	19,177	22,536	82,287
Subtotal:----	14,013	13,550	38,560	39,674	146,037	20,303	20,267	57,838	60,430	231,509
TREE NUTS MT										
ALMONOS, UNSHLO	1,460	2,532	6,657	9,074	19,609	3,823	6,141	16,999	21,928	47,853
PISTACHIO, UNSHLO	1,856	565	5,323	2,170	10,231	6,815	2,316	18,543	9,233	36,474
WALNUTS, SHLO	3,168	2,545	9,082	8,893	21,139	9,819	9,984	27,298	30,687	74,538
WALNUTS, UNSHLO	2,656	1,331	51,811	47,721	62,144	5,250	2,735	100,102	102,295	121,252
OTHER NUTS	5,811	4,612	27,305	21,333	73,592	16,965	15,326	72,897	61,155	206,474
ALMONOS, SH/PREP	29,381	15,592	87,609	59,680	282,227	78,725	81,562	230,025	298,912	894,225
Subtotal:----	44,332	27,176	187,787	148,870	468,942	121,396	118,065	465,864	524,211	1,380,816
NUSERY PROOUCTS MIXED										
CUT FLOWERS	0	0	0	0	0	3,344	3,419	10,448	11,420	46,529
OTHER NURSERY	0	0	0	0	0	10,665	12,439	37,575	39,407	154,613
Subtotal:----	0	0	0	0	0	14,009	15,859	48,023	50,827	201,142
HOPS & PROOUCTS MT										
HOP EXTRACT	644	482	1,307	1,094	3,751	7,925	8,771	19,448	18,356	60,224
HOP PELLETS	976	599	2,105	1,735	5,549	4,850	2,714	10,787	8,824	30,441
HOPS, NFSP	308	341	1,317	821	2,860	2,248	1,626	7,308	4,345	16,847
Subtotal:----	1,928	1,422	4,729	3,649	12,160	15,023	13,111	37,543	31,524	107,512
WINE KL										
GRAPE WINES	12,090	12,678	36,367	42,046	157,116	21,517	23,510	65,715	80,270	287,482
OTHER WINE PROO	1,006	1,174	3,467	3,676	12,896	1,495	1,735	4,280	5,055	17,212
Subtotal:----	13,096	13,852	39,834	45,723	170,011	23,012	25,245	69,995	85,325	304,694
MISCELLANEOUS MIXEO										
8EER & 8EVERAGES	50,049	54,256	194,865	168,838	744,403	29,116	31,752	116,517	102,859	452,774
EDIBLE PREPARATIO	16,026	16,681	49,934	54,803	208,291	60,046	72,694	177,011	236,370	813,101
GINSENG	64	101	603	571	893	6,692	9,006	55,632	43,797	77,527
POTATO CHIPS	4,154	4,046	15,510	13,992	59,922	11,421	10,824	43,889	36,579	166,159
OTHER MISC	0	0	0	0	0	62,271	82,504	210,421	259,118	946,032
Subtotal:----	70,293	75,084	260,912	238,204	1,013,509	169,545	206,780	603,469	678,723	2,455,592
Grand Total:						782,092	787,671	2,613,505	2,781,379	10,019,403

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER - SEPTEMBER YEAR
DEC 1996

NAME	QUANTITY					VALUES (1000 DOLLARS)				
GROUP & COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MON LAST YR	CURR MON CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT MT										
APPLES	6,280	6,155	33,975	40,775	175,491	2,936	2,691	11,839	13,054	103,231
AVOCADOS	1,179	2,556	14,878	17,165	23,118	821	2,012	13,004	15,822	20,455
BANANAS	283,658	287,655	906,964	901,250	3,782,707	80,019	84,293	256,887	262,115	1,093,212
CANTALOUPE	30,682	32,236	51,324	53,437	333,902	8,732	12,114	15,203	19,025	106,031
GRAPES	13,204	30,010	13,753	32,481	341,098	23,990	64,433	24,768	65,310	344,799
KIWIFRUIT	706	1,895	1,718	4,330	37,301	526	1,640	1,512	3,938	24,039
MANGOES	1,974	3,573	4,845	10,144	166,058	2,020	3,008	6,123	9,897	100,039
PEACHES	4,088	6,596	4,264	7,242	41,287	4,375	6,862	4,565	7,613	31,085
PEARS	403	493	1,505	1,472	57,371	446	1,338	3,931	3,916	34,106
PINEAPPLES	8,999	12,573	28,951	35,659	128,547	3,247	6,042	10,102	16,638	47,758
STRAWBERRY	1,035	1,383	1,724	2,205	30,048	1,771	2,429	3,286	4,196	54,522
OTHER MELONS	30,098	33,107	57,239	64,289	327,524	9,203	8,533	16,628	18,709	92,781
OTHER FRUIT	43,336	49,908	139,007	151,752	538,529	24,197	30,985	66,542	81,497	263,393
Subtotal:----	425,642	468,140	1,260,148	1,322,200	5,982,982	162,282	226,379	434,391	521,730	2,315,450
DRIED FRUIT MT										
DRIED APRICOTS	1,460	1,420	4,973	4,057	14,069	3,031	3,960	10,546	10,879	30,639
DRD FIGS & PST	266	120	1,872	1,545	5,044	401	248	3,507	3,495	7,188
OTHER DRIED FRUI	2,570	2,170	7,397	6,589	25,302	3,773	4,168	10,502	12,123	39,682
Subtotal:----	4,295	3,710	14,242	12,191	44,416	7,206	8,377	24,556	26,497	77,510
FROZEN FRUIT MT										
FZN BLUEBERRIES	504	856	2,242	3,600	10,472	663	1,702	2,776	7,094	16,085
FZN STRAWBERRIES	448	560	1,109	955	21,148	362	559	977	1,033	17,669
OTHER FZN FRUIT	1,267	2,027	4,731	6,755	33,720	1,550	2,516	5,655	8,002	38,421
Subtotal:----	2,219	3,443	8,082	11,310	65,340	2,575	4,777	9,408	16,129	72,175
CANNED/PREP FRUIT MT										
CANNED OLIVES	5,681	5,908	20,817	18,267	72,282	14,871	14,675	50,243	47,601	181,991
CANNED ORANGES	3,615	2,931	6,557	9,717	59,849	4,136	2,928	7,327	9,843	64,148
CANNED PEACHES	1,888	2,901	5,249	10,949	17,062	1,304	2,009	3,595	7,248	11,726
CANNED PINEAPPLE	17,167	22,357	72,707	63,789	306,266	11,829	15,534	42,004	44,866	195,435
MIXED FRUIT	6,160	4,825	11,828	10,630	46,109	5,263	4,509	10,490	10,418	42,609
PREP/PRES FRUIT	5,137	9,556	17,773	22,963	70,663	7,448	11,393	24,329	27,504	88,398
OTHER CANNED FRU	4,057	4,702	13,736	15,824	63,644	5,318	6,497	18,504	20,833	78,573
Subtotal:----	43,706	53,180	148,667	152,140	635,875	50,170	57,546	156,492	168,312	662,879
FRT&VEG JUICE SSE KL										
APPLE JUICE	61,104	139,684	180,820	300,818	856,697	26,945	48,227	73,310	103,079	327,267
FCOJ	55,261	133,800	177,420	407,006	816,744	13,306	27,821	41,783	91,930	215,338
GRAPE JUICE	13,749	11,491	40,802	46,400	218,866	3,630	4,639	10,963	16,612	62,896
PINEAPPLE JUICE	31,702	31,381	82,639	76,981	323,038	7,279	9,183	17,625	22,108	85,004
OTHER JUICES	8,265	19,093	32,464	54,229	238,032	6,491	11,504	22,924	31,729	139,434
Subtotal:----	170,080	335,450	514,145	885,435	2,453,377	57,650	101,375	166,604	265,458	829,939
FRESH VEGETABLES MT										
GARLIC	651	300	1,642	1,144	22,438	701	422	1,805	1,693	27,212
ASPARAGUS	3,113	3,322	9,882	11,084	33,333	5,389	6,395	16,526	18,062	58,156
BELL PEPPER	18,130	22,256	31,868	37,443	165,549	14,561	33,332	29,793	52,548	147,926
CARROTS	11,773	11,719	38,433	37,322	101,943	3,120	2,716	9,564	8,364	24,298
CHILI PEPPER	5,586	6,821	20,392	22,571	104,009	5,583	3,461	13,601	8,391	51,477
CUCUMBERS	40,776	47,799	79,349	94,745	295,907	8,135	14,599	18,014	30,241	115,608
ONIONS	13,980	22,180	32,003	46,687	266,779	10,967	13,870	33,362	35,655	146,632
POTATOES	40,996	26,219	118,211	75,757	489,908	8,346	4,766	23,134	14,540	98,581
SQUASH	15,034	17,779	37,263	43,844	132,970	4,187	10,657	11,758	26,568	67,300
TOMATOES	55,255	56,045	118,749	131,278	724,621	57,335	38,753	97,998	90,489	679,977
OTHER FRESH VEG	39,853	41,717	98,793	97,775	435,237	22,035	25,968	54,485	57,652	234,033
Subtotal:----	245,148	256,158	586,587	599,650	2,772,695	140,360	154,938	310,041	344,204	1,651,200
CANNED/DEHYD VEGE MT										
CND ARTICHOKES	1,376	1,839	5,404	6,333	26,367	2,550	3,095	10,211	10,517	45,213
CND BAMBOO	2,321	3,159	10,746	9,661	27,392	2,501	2,818	10,591	8,893	27,056
CND MUSHROOMS	4,222	6,610	12,014	17,337	56,569	9,658	10,896	28,132	30,727	115,561
CND PIMIENTO	775	797	1,975	2,733	8,171	1,111	957	2,778	3,416	10,493
CND TOMATOES	4,123	5,498	13,179	17,950	48,630	1,724	2,374	5,739	7,852	20,491
CND WATERCHNUTS	797	1,539	3,130	4,239	39,633	561	1,553	2,272	4,465	31,746
TOMATO PST & SAU	1,890	1,734	8,329	6,313	34,204	2,016	2,264	7,628	7,215	31,648
DRIED MUSHROOMS	122	168	306	354	1,536	1,901	1,600	4,479	4,141	17,049
DRIED TOMATOES	449	860	1,465	2,737	6,106	1,573	3,195	5,404	10,156	23,027
OTHER DEHY VEG	10,966	13,344	29,648	43,874	128,049	10,290	14,829	28,356	41,441	128,352
OTHER CAN VEG	17,384	19,427	52,267	61,446	211,272	17,575	17,534	51,575	55,743	198,012
Subtotal:----	44,425	54,974	138,462	172,977	587,930	51,461	61,114	157,164	184,566	648,648
FROZEN VEGETABLES MT										
BROCCOLI FZN	13,372	15,373	46,547	46,199	181,663	7,819	9,788	26,968	29,469	102,188
CAULIFLOWER FZN	3,131	4,013	9,022	9,413	18,351	1,895	3,134	5,458	7,123	11,559
POTATO FZN	15,855	25,019	43,505	66,483	183,071	9,347	15,001	26,151	40,320	112,893
OTHER VEG FZN	9,205	12,091	54,478	40,015	208,908	8,078	10,040	25,439	31,648	104,601
Subtotal:----	41,564	56,495	153,551	162,110	591,994	27,139	37,963	84,015	108,561	331,241
TREE NUTS MT										
BRAZILS TOT	533	525	1,296	2,061	7,821	1,381	1,645	3,387	6,350	16,613
CASHEWS TOT	4,128	3,945	13,193	13,935	61,038	20,318	18,669	65,821	66,749	300,213
COCONUT	4,641	3,600	16,368	11,285	43,090	3,358	2,921	12,839	10,042	35,895
PECANS	8,818	4,988	15,845	11,799	24,814	13,640	6,629	27,241	17,435	53,623
OTHER NUTS	1,347	1,945	6,905	7,518	18,533	5,916	8,767	24,933	29,376	74,881
Subtotal.----	19,467	15,003	53,607	46,599	155,296	44,614	38,632	134,221	129,952	481,224
NURSEY PRODUCTS M										
CARNATIONS	114,328	115,461	320,312	306,887	1,278,692	10,930	10,535	30,226	27,295	129,577
CHRISTMAS TREES	449	603	2,082	2,258	2,126	3,676	5,561	18,047	20,220	18,094
CHRYSANTHEMUS	55,084	52,210	178,990	172,273	676,248	6,736	7,293	23,084	24,195	91,982
ROSES	48,028	48,970	165,466	181,507	829,234	10,673	9,841	32,919	34,190	184,874
TULIP BULBS	7,800	3,691	86,568	84,380	341,260	1,007	438	11,551	10,004	42,074
OTHER CUT FLOWER	0	0	0	0	0	13,992	14,051	41,241	41,194	186,542
OTHER NURSEY PRO	0	0	0	0	0	23,464	23,726	70,162	73,390	277,365
Subtotal:----	225,689	220,935	753,409	747,305	3,127,560	70,478	71,446	227,231	230,487	930,508
HOPS & PRODUCTS MT										
HOPS & PELLETS	1,249	1,303	1,618	1,658	5,365	8,171	9,675	10,547	11,997	37,979
OTHER HOP PROD	0	1	1	2	503	0	16	38	41	3,699
Subtotal:----	1,249	1,303	1,619	1,660	5,867	8,171	9,691	10,585	12,038	41,678
WINE KL										
RED WINE	9,597	12,828	36,221	45,558	150,951	38,724	52,178	148,336	178,949	565,708
SPARKILING WINE	2,106	2,552	14,453	14,017	31,069	20,160	25,330	137,310	143,019	313,991
WHITE WINE	7,847	9,145	29,742	32,677	106,568	26,150	31,427	100,217	116,797	360,701
OTHER WINE PROD	2,221	6,045	8,655	19,826	47,705	6,354	13,545	26,387	48,416	119,764
Subtotal:----	21,771	30,571	89,070	112,078	336,294	91,388	122,481	412,251	487,181	1,360,163
MISCELLANEOUS KL										
BEER & BEVERAGES	101,916	117,606	356,411	371,737	1,565,134	90,485	104,673	313,637	333,383	1,365,034
OTHER MISC	0	0	0	0	0	100,697	111,712	311,818	352,116	1,307,570
Subtotal:----	101,916	117,606	356,411	371,737	1,565,134	191,183	216,385	625,455	685,499	2,672,604
Grand Total:						904,676	1,111,102	2,752,412	3,180,613	12,075,218

EXPORT NEWS AND OPPORTUNITIES

GSM-102 Credit Guarantee Program: Helps to Finance Horticultural Exports

U.S. exporters are utilizing the GSM-102 program to help penetrate a number of horticultural markets around the world. As of February 7, 1997, U.S. exporters have used the GSM program to help finance $800,000 of dried fruit to the Andean Region and $800,000 of canned fruit, fresh fruit, canned vegetables and frozen vegetables to Russia.

The GSM-102 program makes available financing for the sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to three years. Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report. If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with USDA for the amounts due and covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

The following table presents FY 1997 allocations by country and product along with registrations through February 7, 1997, for various horticultural commodities and products. Repayment terms vary under the program, from 90 days to 3 years. *Cautionary information for use of the accompanying table: The table reflects only exporter applications for guarantees that have been entered into the GSM 102 computerized system. At any given time, exporter applications are in process, and not all of those received have been entered into the system. Moreover, all applications are initially entered into the system on a provisional basis until price reviews have been completed, the guarantee fee has been received, and the written guarantee has been issued. Thus, some applications now in the system may in the future be removed, and the commodity balances correspondingly increased.* For details on terms and authorizations, see the footnotes to the table.

Note: The GSM will consider requests to establish a GSM-102 program for a country or region or amend an authorized program to include horticultural commodities and products which are currently not eligible. (For further information on the GSM-102 program for horticultural commodities, contact Yvette Wedderburn Bomersheim, 202-720-9903).

Supplier Credit Guarantee Program: No activity since last publication

The new Supplier Credit Guarantee Program (SCGP) is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

Note: The GSM will consider requests to establish a SCGP for a country or region or amend an authorized program to include horticultural commodities and products which are currently not eligible. (For further information on the SCGP for horticultural commodities, contact Yvette Wedderburn Bomersheim, 202-720-9903).

FY 1997 GSM-102
CREDIT GUARANTEE COVERAGE 1/

Country/Commodity	Announced Allocation 12/ In Millions of Dollars)	Exporter Applications Received (In Millions of Dollars)	Balance In Millions of Dollars)
ANDEAN REGION 2/	**200.0**	**59.3**	**140.7**
Dried fruit 7/		0.8	
Fresh fruit 6/		0.0	
Frozen fruit		0.0	
Tree nuts 5/		0.0	
BRAZIL	**75.0**	**18.7**	**56.3**
Fresh fruit 6/		4.6	
Potatoes		0.0	
CENTRAL AMERICA REGION 4/	**40.0**	**25.2**	**14.8**
Potatoes		0.0	
CHINA	**100.0**	**5.1**	**94.9**
Fresh fruit (apples & cherries)		0.0	
Potatoes		0.0	
CZECH REPUBLIC	**10.0**	**0.0**	**10.0**
Fresh fruit 6/		0.0	
Potatoes		0.0	
EAST AFRICA REGION 11/	**35.0**	**8.8**	**26.2**
Potatoes		0.0	
EAST CARIBBEAN REGION 3/	**50.0**	**21.1**	**28.9**
Fresh fruit 6/		0.0	
EGYPT	**100.0**	**80.2**	**19.8**
Fresh fruit 6/		0.0	
Potatoes		0.0	
INDIA	**15.0**	**0.0**	**15.0**
Tree nuts 5/		0.0	
INDONESIA	**100.0**	**80.6**	**19.4**
Dried fruit 7/		0.0	
Fresh fruit 6/		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
MEXICO	**800.0**	**512.8**	**287.2**
Fresh fruit 6/		0.0	
Hops and Products		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
PAPUA NEW GUINEA	**1.0**	**0.0**	**1.0**
Canned vegetables		0.0	
POLAND	**25.0**	**0.0**	**25.0**
Potatoes		0.0	

FY 1997 GSM-102
CREDIT GUARANTEE COVERAGE 1/

Country/Commodity	Announced Allocation 12/ In Millions of Dollars)	Exporter Applications Received (In Millions of Dollars)	Balance In Millions of Dollars)
RUSSIA	**50.0**	**29.7**	**20.3**
Canned fruit 4/		0.06	
Canned vegetables 8/		0.06	
Dehydrated instant soup		0.0	
Fresh fruit 6/		0.6	
Fresh vegetables 9/		0.08	
Frozen vegetables		0.0	
Frozen concentrated orange juice		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
SLOVAKIA	**10.0**	**0.0**	**10.0**
Frozen concentrated orange juice		0.0	
SOUTHERN AFRICA REGION 10/	**50.0**	**0.0**	**50.0**
Potatoes		0.0	
TUNISIA	**30.0**	**2.6**	**27.4**
Tree nuts 5/			

1/ Coverage announced for FY 1997 as of February 7, 1997 as detailed in FAS Program Announcements (tel: 202-690-1621 for information); unless otherwise noted, terms are FOB, 90-days to 3 years. 2/ Barbados, Grenada, Guyana, St. Lucia, St. Vincent, and the Grenadines, Surinam, Trinidad and Tobago. 3/ Bolivia, Colombia, Ecuador, Chile, Peru, and Venezuela. 4/ Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama. 5/ almonds, pecans, pistachios, walnuts, Hazelnuts. 6/ Apples, apricots, avocadoes, blueberries, cherries, grapes, grapefruit, kiwifruit, lemons, melons, (watermelons, cantaloup, and honeydew), nectarines, oranges, pears, plums, peaches, raspberries, strawberries, tangerines. 7/ raisins, prunes, dates, figs, apples. 8/ asparagus, beans, carrots, corn, peas, tomatoes, tomato paste. 9/ asparagus, beans, broccoli, carrots, cauliflower, celery, corn, garlic, lettuce, onions, peppers, potatoes, and tomatoes. 10/Angola, Botswana, Burundi, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Rwanda, Sudan, Seychelles, South Africa, Swaziland, Tanzania, Zambia, and Zimbabwe. 11/ Kenya and Uganda. 12/ All commodities, including those not listed.

FY 1997
SUPPLIER CREDIT COVERAGE 1/

Country/Commodity	Announced Allocation 9/ In Millions of Dollars)	Exporter Applications Received (In Millions of Dollars)	Balance In Millions of Dollars)
GUATEMALA	**10.0**	**2.1**	**7.9**
Fresh fruit 3/		0.0	
MEXICO	**30.0**	**0.8**	**29.2**
Dried fruit 5/		0.0	
Canned fruit 4/		0.0	
Canned vegetables 6/		0.0	
Fresh fruit 3/		0.0	
Fresh vegetables 7/		0.0	
Frozen vegetables 8/		0.0	
Potatoes		0.0	
Tree nuts 2/		0.0	
Wine; Brandy		0.0	

1/ Coverage announced for FY 1997 as of February 7, 1997 as detailed in FAS Program Announcements (tel: 202-690-1621 for information. 2/ almonds, pecans, pistachios, walnuts, hazelnuts. 3/ Apples, apricots, avocadoes, blueberries, cherries, grapes, grapefruit, kiwifruit, lemons, melons, nectarines, oranges, pears, plums, peaches, raspberries, strawberries, tangerines. 4/ peaches, pears, cocktail, tart cherries. 5/ raisins, prunes, dates, figs. 6/ asparagus, beans, carrots, corn, peas, tomatoes, tomato paste. 7/ asparagus, beans, broccoli, carrots, cauliflower, celery, corn, garlic, lettuce, onions, peppers, potatoes, tomatoes. 8/ beans, broccoli, carrots, corn, spinach. 9/ All commodities, including those not listed.

Taiwan expands market access for Chilean fruit

Taiwan has granted Chile 1996/97 import quotas of 71,428 cartons of plums, and 73,170 cartons of table grapes, while increasing the apple quota from 473,684 cartons in 1995/96 to 657,894 cartons. The value of the plum, table grape and apple quotas is estimated at $18.5 million according to the Ministry of Agriculture. The Government of Chile fully expects the trade to fill the quotas in 1996/97 thereby raising the value of fruit exports to Taiwan to $20 million.

Fresh fruits continue to be the largest component of U.S. horticultural exports to Taiwan. In calendar year 1996, U.S. fresh fruit exports to Taiwan were valued at $176 million. Apple shipments, at $79 million, accounted for 45 percent of the value of all fruit exported to Taiwan in 1996. Apple imports from the United States and Canada are not subject to quotas.

WORLD TRADE SITUATION AND POLICY UPDATES

United States lifts 83-Year ban on Mexican avocado imports

USDA on January 31, 1997, published a final rule that lifted the long-standing ban on imports of Mexican fresh avocados. This ban had been in place to protect the California avocado growing areas from pests present in Mexican growing areas. After a review of the current situation, public comments, and the development of strict standards to be met for imports from Mexico, USDA determined that the United States can safely import Mexican avocados under certain conditions. The imports would be allowed in only 19 Northeastern States and the District of Columbia between November and February of each year, when pests are less likely to survive. In addition, only approved Mexican growing areas will be permitted to export and there will be a series of mandatory inspections by USDA's Animal and Plant Health Inspection Service (APHIS) during the growing, packing, and shipping processes.

In 1995/96 the United States imported over 21,000 tons of avocados, primarily from Chile and the Dominican Republic. U.S. production of avocados that year was 172,590 tons. Mexican officials estimate that they may be able to export 5,000 to 20,000 tons to the United States in the upcoming 1997/98 marketing year.

EU considering new technical requirements on imported citrus

The EU Commission's Standing Committee for Plant Health is considering new technical import requirements for third country citrus. Recently, the EU lifted protected zone status for Greece and Italy, which restricted (for Greece, banned) imports from third countries. Now those countries reportedly are spurring the initiative to impose stringent new technical-based requirements on imported citrus EU-wide. USDA officials are responding to this developing issue.

Grapefruit accounts for the bulk of U.S. citrus exports to the EU, with Florida supplying most of the product shipped. In FY 1996, U.S. grapefruit exports to the EU totaled 138,387 metric tons, with a value of more than $61 million. Led by the markets of France and the Netherlands, the EU collectively ranks second only to Japan as a market for U.S. grapefruit.

The United States and Mexico finalize cherry access agreement

USDA and Government of Mexico officials met on February 19 to formalize a technical agreement that will permit access to Mexico for sweet cherries produced in Washington, Oregon, and California. Exports are expected to commence with the coming shipping season, with some industry contacts forecasting eventual sales in the range of $10-15 million dollars annually. Overall, U.S. sweet cherry exports to all destinations were valued at $123 million in CY 1996, with Japan being the principal market, accounting for 65 percent of that total.

The recent USDA decision on Mexican avocados, and now the cherry market opening, has removed two high profile issues from the two countries'

trade agendas. Nevertheless, a number of technical issues, which either preclude or constrain U.S. access to Mexico, remain outstanding. For example, Mexico continues to maintain technically-based import bans on Florida and Arizona citrus. The existing apple export work plan effectively precludes access for certain U.S. supplying states, in large part due to the costly oversight/inspection requirements.

WORLD FRESH APPLE SITUATION AND U.S. EXPORT PROSPECTS

Apple production by the world's leading producing countries in marketing year 1996/97 is forecast at a record 42.3 million tons, 9 percent above last year's output. China accounts for three-quarters of the increase in world apple production in 1996/97. Apple crops also are larger in Italy, Germany, Poland, and Chile. On the other hand, apple production in the United States, New Zealand, and South Africa, as well as in Belgium and the Netherlands, is down in 1996/97. Apple exports in 1996/97 are forecast at 4.5 million tons, practically unchanged from 1995/96 shipments. Smaller crops in some EU countries and New Zealand have reduced export prospects in 1996/97. U.S. apple exports in 1996/97, however, are expected to increase 20 percent to 675,000 tons. Larger exportable supplies from western states and strong demand from leading costumers have improved overall U.S. export prospects in 1996/97. The United States has reached several technical agreements with foreign countries, which are expected to result in improved access to important markets in 1996/97.

Northern Hemisphere

Northern Hemisphere 1996/97 apple production and export forecasts revised up

The major apple producing countries in the Northern Hemisphere are now expected to harvest a record 37.9 million tons in marketing year (MY) 1996/97, 9 percent above last season's output. Increased production prospects in major apple producing countries such as China, Italy, and Germany are expected to more than offset smaller apple crops in the United States and France. China, the world's leading apple producer, accounts for about 40 percent of Northern Hemisphere apple output. In comparison, the United States and principal European Union (EU) countries combined account for another 35 percent.

The 1996/97 U.S. apple production is revised down to 4.7 million tons compared to 4.8 million tons forecast in November (for details, see the November 1996 issue of *World Horticultural Trade & U.S. Export Opportunities*). Production in the western states is forecast up, particularly in the states of Washington and California. Output in the central and eastern states is forecast down as a result of unfavorable weather conditions across much of the region. Washington State and California normally account for more than half of total U.S. annual apple production.

Total Northern Hemisphere apple exports in 1996/97 are revised slightly up to 3.3 million tons. Smaller crops in some EU countries, specially those in France and Belgium, have decreased overall EU export prospects in 1996/97. U.S. apple exports, however, are forecast to increase 20 percent in 1996/97 to 675,000 tons. Larger exportable supplies from northwestern states and decreased apple crops in major competitor countries have improved overall U.S. export prospects in 1996/97. The United States has also reached several technical agreements, which are expected to result in increased access to important markets. The EU and the United States account for more than 80 percent of annual Northern Hemisphere apple exports. Intra-EU trade accounts for about 85 percent of EU apple exports.

Taiwan will remain a major destination for U.S. apple exports in 1996/97

U.S. apple exports are forecast to recover in 1996/97. Shipments from the United States are forecast at 675,000 tons, 20 percent above exports in 1995/96 and close to the record 697,829 tons exported in 1994/95 . A larger crop in Washington state and likely strong demand in leading markets have improved U.S. apple export expectations in 1996/97. Asian countries will continue to lead the U.S. export performance for apples in 1996/97. Canada, Mexico, and Brazil are also forecast to be major destinations.

From July to December 1996 (MY 1996/97), apple exports to Taiwan, the U.S. major market, totaled 75,557 tons, 22 percent above shipments the same period in 1995. Apple exports to Taiwan are expected to continue to grow in 1996/97. Ample supplies of U.S. Fuji combined with the recent recovery of Taiwan's economy will keep exports strong to this country. By surpassing Granny Smith production, Fuji apples now rank as Washington state's third largest variety following Red and Golden Delicious apples. Fuji is still the most popular variety for Chinese tastes.

In November 1996, South Africa announced it will extend diplomatic recognition to mainland China. The Taiwan government has since announced retaliatory measures against South Africa. This news has not yet affected the apple import quota assigned to South Africa, which remains at 1,200 tons per year. However, Taiwan has increased Chile's apple import quotas from about 8,600 tons in 1995/96 to approximately 12,000 tons in 1996/97. Taiwan's apple imports from the United States and Canada are not subject to quotas.

Although a recovery of Mexico's economy could translate into improved exports of U.S. apples, inspection procedures limit trade

A steady economic recovery and a lower inflation rate is expected in Mexico during 1997. This should translate into improved consumer purchasing power for better quality apples. Consequently, Mexican imports of U.S. apples in 1996/97 are expected to be about 3 percent above the previous season's shipments. From July to December 1996, U.S. apple exports to Mexico reached 20,262 tons, 2 percent ahead of shipments the same period in 1995. Reportedly, U.S. apple prices are good and demand has been sustained.

However, U.S. exports to Mexico are hampered by a costly and problematic inspection program (work plan), which limits imports to apples from the Pacific Northwest states. Despite approval for 8 additional states, only Washington, Oregon, and Idaho are participating in the export program because the costs of maintaining Mexican inspectors are prohibitive for the other states. Before exporting apples to Mexico, U.S. counties must be certified by the Mexican government. Before shipment is allowed, apples must be held in cold storage at zero degrees Celsius for 40 days or at 3.3 degrees Celsius for 90 days. Cold chambers must be certified by the State Departments of Agriculture and Mexican authorities.

U.S. Fuji exports to Canada hampered by import requirement for watercore

Although Canada continues to be the third largest destination for U.S. apples, Fuji produced in the United States are prohibited from being shipped to Canada due to that country's import requirements for watercore. Watercore is the accumulation of sugar in the vascular bundles around the core of an apple. Although less than desirable for storage purposes in most apple varieties, watercore is, reportedly, a natural and often desirable attribute in Fuji.

Specifically, Canadian import requirements dictate that apples must meet U.S. Condition Standards for Export. Current U.S. condition standards for apples require that not more than five percent of the apples in any lot be "damaged" by watercore. While the application of this requirement may be waived for the export of Fuji apples to most foreign customers, it serves as a regulatory barrier to trade with Canada. In response, the U.S. industry has requested a waiver from the Agricultural Marketing Service of the U.S. tolerance for the presence of watercore in Fuji.

Brazil has become an important market for U.S. apples

U.S. apple exports to Brazil have increased dramatically in recent years due mainly to the elimination of import barriers and an overall

improvement on the Brazilian economy. For example, U.S. apple exports to Brazil 1995/96 totaled 13,207 tons, valued at almost $6 million, moving Brazil to tenth place among major U.S. apple customers. This figure is compared tc 384 tons, valued at $212,925 four seasons earlier (1991/92).

Recent (July 1996) agreements for the entry of U.S. apples into Brazil and access to supplier financing, under the USDA GSM-102 credit guarantee program, will continue to boost U.S. exports to Brazil in 1996/97. From July to December 1996, apple exports to Brazil totaled 15,172 tons, more than 30 percent above shipments during the same period in 1995. Brazilian importers used the GSM-102 credit guarantee program for the first time in November 1996. Moreover, market promotion efforts under the USDA Market Access Program (MAP) will continue to assist in developing the Brazilian market.

The Brazilian market is becoming less seasonal with apples available in supermarkets year around at fairly stable prices. Apples have had an image of being a luxury fruit, mostly for the upper income groups or to be consumed during special occasions. This is changing, with the overall price and income stability brought about by the economic stabilization program launched in mid-1994.

Although China's apple supplies will remain strong, U.S. apple sales will continue in the Chinese market

China is the world's largest apple producer. China's 1996/97 apple crop is forecast at 16.7 million tons, up 19 percent from 1995/96, and almost double the amount produced 4 seasons ago. The major production provinces for apples are Shandong, Shaanxi, Henan, Liaoning and Hebei.

On average China exports about 100,000 tons of apples every year. The majority of China's apple exports go to Russia and East Asian countries with large urban populations. A smaller percentage of China's apple exports go to other neighbor countries, such as Uzbekstan and Kazakhstan.

Although China is a surplus producer, it still imports some apples to meet demand for variety and higher quality fruits. China's apple imports are mainly from the United States, Canada, and New Zealand. According to China's Customs General Administration, China imported about 7,000 tons of fresh apples, valued at about $2 million, from the United States in 1995/96. This figure accounted for almost 50 percent of the total Chinese apple imports last season. However, China's apple imports likely are underestimated due to the undocumented trade through Hong Kong.

While many U.S. fresh fruits are still prohibited by the Chinese government, due to concerns over Mediterranean Fruit Fly, China permits the importation of fresh Red and Golden Delicious apples only from Washington, Oregon, and Idaho. China's Animal and Plant Quarantine Service (CAPQ) refuses to approve the additional varieties of U.S. Fuji, Gala, Granny Smith, Rome, Jonagold, and Braeburn apples for importation, citing its belief that these varieties pose a significantly higher risk than Red Delicious and Golden Delicious of transmitting fireblight. The next technical bilateral meeting between CAPQ and the USDA's Animal and Plant Health Inspection Service (APHIS) is tentatively planned for April 1997 in China. Nevertheless, U.S. apple sales to China will continue in most of the affluent Chinese cities, such as Shanghai, Guangzhou, and Shenzhen. The current add valorem duty is 40 percent plus an additional value added tax of 13 percent.

Fraudulent fruit worries Chinese apple traders

To keep abreast with the constant increase in China's standard of living, more and more apple imports are needed and will become popular with Chinese consumers. This tremendous change also gives rise to problems. One big worry at the moment is the situation where many apple vendors are passing their apples off as name brand imports or superfine with false labels and fake packaging. Chinese consumers are disappointed because a certain number of fruits put on the market recently are just stacks of local produce with fake labels.

Southern Hemisphere

Apple production and trade in Southern Hemisphere countries will remain strong in 1996/97

Apple production in selected countries of the Southern Hemisphere in 1996/97 (harvest early in 1997) is forecast at a record 4.3 million tons. All

Southern Hemisphere countries, except New Zealand and South Africa, are forecast to have increased output in 1996/97.

Apple exports from the Southern Hemisphere in 1996/97 are forecast at 1.2 million tons, slightly higher than shipments in 1995/96. Ample exportable supplies in Chile, Argentina, and South Africa will lead Southern Hemisphere apple exports in 1996/97.

Chile will continue to be a major competitor for U.S. apple exporters

Chilean apple production and, consequently exports, are forecast to increase again in 1996/97. In the absence of mandatory quality controls, Chilean fruit exporters have concentrated their efforts on promotional campaigns, diversifying export markets, and trade liberalization. In recent years, Chile has signed free trade agreements with Mexico, Colombia, Venezuela, and Ecuador. Chile has also made progress in establishing phytosanitary agreements and protocols with several countries including Japan, South Korea, Hong Kong, China, the Philippines, Malaysia, and New Zealand.

The most promising market in the near future appears to be Japan. The lack of quarantine or fumigation treatment would save time and money for Chilean fruit exporters shipping to Asia. In addition to Japan, the industry hopes to gain full access in 1997 to China, South Korea and Taiwan, among other Asian countries. Although red apple varieties currently account for about two-thirds of Chilean exports, new varieties like Fuji are increasing their share while traditional varieties are losing ground.
In 1995/96, Chilean apple exports increased slightly, when compared to a year earlier, as a result of a strong export demand, a good-quality harvest, and stricter export quality controls, particularly for shipments to Europe. Apple sales in 1995/96 also expanded to Latin American markets. However, in spite of a higher volume of exports in 1995/96, economic returns to growers continued to suffer from a continual strengthening of the Chilean peso, which has increased production costs.

A lack of mandatory, uniform quality standards for exported fruit is a major concern among Chilean apple exporters

For several years now, Chilean producers and exporters have attempted to implement a mandatory quality control program. However, despite a joint government/private sector proposal to institute mandatory quality control measures for Chilean fresh fruit, elements opposed to the bill continue to halt passage of any legislation. The industry, fearful of government intervention in Chilean commerce, would like to fashion a program that would be controlled by the private sector but sanctioned by the Government. Nevertheless, the fruit sector will maintain the voluntary fruit export quality program for apples, table grapes, stone fruit, and kiwis shipped to the United States and Europe in 1996/97. Nearly 80 percent of Chile's exports to these two markets are under the auspices of this quality program. The voluntary minimum standards for 1996/97 are similar than those of the previous season. The growers and exporters have agreed to limit the quality control only to maturity of the fruit. There are no requirements for the size of the fruit or volumes exported.

New Zealand reached record apple production and exports in 1995/96

The 1995/96 New Zealand apple crop reached a record 547,200 tons. Climatic conditions over the 1995/96 season were generally well suited to quality apple production. Consequently, apple exports in 1995/96 totaled a record 433,000 tons, slightly above the previous record, set in 1994/95.

Discovery of mealy bugs in the Hawkes Bay was a concern at the beginning of the 1995/96 export season for fruit destined for the U.S. market. The findings disrupted fruit movements and cold storage capacity was tight. Moreover, on May 2, 1996, Mediterranean Fruit Fly was identified in suburban Auckland. Over a period of several days following the medfly detection, many of New Zealand's important trading partners imposed exclusion zones of varying radius around the initial find site. The exclusion zones ranged from zero (EU) to the whole of the North Island (China). However, the effect on New Zealand's apple exports was insignificant as it did not encompass the commercial growing regions or shipping ports. All trading partners are expected to have lifted their import restrictions. However, China has decided not to lift its import ban until May

2, 1997, which is one year from the date of discovery.

Hail reduces New Zealand's apple production and exports in 1996/97

The 1996/97 New Zealand apple crop has suffered a major setback after repeated hailstorms over all growing areas. Total apple production is forecast to decline 12 percent and export volumes could be down 16 percent in 1996/97. Some entire orchards have been written off in successive hailstorms which swept through the New Zealand apple growing areas in Nelson, Hawkes Bay, and Christchurch in November and December, 1996. Few orchards were untouched, and large volumes of damaged fruit are being processed for juice operations.

The government has announced a modest package designed to help fruit growers, including direct financial assistance for hail damage. Local assistance includes Taskforce Green (subsidized labor) help for growers who have lost more than half of their crop; social services assistance for orchardists unable to meet living costs; and grants of several thousand dollars for urgent technical advice.

Export permits debate continues in New Zealand

Apple exports in New Zealand are controlled by the Apple and Pear Marketing Board (APMB), a statutory monopoly. However, APMB has been under intense pressure in recent months to exercise its authority to grant export permits. Recently, APMB made modest changes to the structure of its Export Permit Committee in an effort to demonstrate fairness to potential apple exporters. The committee has been reduced from six members to five, with the Board chairman stepping down from his role as committee chairman. There have been, however, calls by several independent exporters for a judicial review of the Board's export permit process. Reportedly, some independent exporters have consistently had export permits denied or only been granted a fraction of the volume requested by the Export Permit Committee.

South Africa's agricultural initiatives may eliminate export monopoly

South Africa exports apples to many countries around the world, with the EU ranking as the main market. Apple exports in 1995/96 declined 7 percent due to the poor quality of the crop, the lateness of the season, that resulted in larger volumes being exported by air, improved local prices for red apple varieties, relatively high exports from competing Southern Hemisphere suppliers, and the ability of Northern Hemisphere marketeers to keep their products on the retail shelves for a longer period than usual at low prices. All these factors, coupled with the removal of the General Export Incentive Scheme, made South Africa's apple exports difficult during 1996. South African agricultural policy makers have proposed phasing out of Marketing Boards and single channel marketing schemes. This would adversely affect UNIFRUCO, which has a virtual monopoly on South African fruit exports.

South Africa is expanding its marketing ventures to the Far East and to former Soviet Union countries, with Russia, now its third largest European apple market, holding great potential. South Africa is increasingly entering the Sub-Saharan African market, with considerable amounts exported to Angola, Kenya, Mauritius, Zambia, and Zimbabwe. Despite this, the EU is still the most important overseas market for South African apples, with Britain and Belgium dominating with 37 percent and 19 percent, respectively.

(For further information on supply, distribution, and trade, contact Samuel Rosa at 202-720-6086. For information on production, contact Kelly Stzelecki at 202-720-6791.)

TABLE 1
APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country Mktg. Year 1/	Total Production	Commercial Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
NORTHERN HEMISPHERE COUNTRIES								
EUROPEAN UNION (EU)								
Austria								
1993/94	318,200	157,200	4,100	322,300	25,800	292,500	4,000	0
1994/95	286,700	146,900	15,000	301,700	30,000	258,700	13,000	0
1995/96	324,200	156,600	40,800	365,000	80,000	265,000	20,000	0
1996/97 F	308,600	138,600	25,400	334,000	67,000	262,000	5,000	0
Belgium-Luxembourg								
1993/94	530,215	529,137	89,559	619,774	181,382	257,243	106,000	75,149
1994/95	527,650	526,550	100,244	627,894	170,366	298,558	142,500	16,470
1995/96	513,935	512,740	187,908	701,843	245,442	301,171	155,000	230
1996/97 F	300,788	299,188	150,000	450,788	90,000	289,788	70,000	1,000
Denmark								
1993/94	85,000	45,000	25,000	110,000	3,000	80,000	26,500	500
1994/95	77,500	37,500	31,600	109,100	1,600	85,000	22,000	500
1995/96	65,000	30,000	38,057	103,057	1,756	82,801	18,000	500
1996/97 F	65,000	30,000	40,000	105,000	1,800	84,700	18,000	500
France								
1993/94	2,079,000	2,043,700	97,200	2,176,200	620,200	838,500	275,000	442,500
1994/95	2,166,300	2,128,300	86,200	2,252,500	642,800	953,400	275,000	381,300
1995/96	2,088,500	2,055,500	53,000	2,141,500	860,000	912,500	275,000	94,000
1996/97 F	2,048,800	2,013,800	70,000	2,118,800	853,000	930,800	275,000	60,000
Germany								
1993/94	1,718,500	882,500	717,718	2,436,218	43,856	1,300,000	1,046,062	46,300
1994/95	2,079,500	879,500	631,858	2,711,358	65,078	1,453,200	1,166,680	26,400
1995/96	1,373,000	573,000	925,184	2,298,184	42,511	1,150,000	1,105,673	0
1996/97 F	1,775,700	775,700	900,000	2,675,700	40,000	1,300,000	1,335,700	0
Greece								
1993/94	325,341	312,341	11,008	336,349	9,045	220,795	800	105,709
1994/95	321,996	309,096	17,870	339,866	20,065	222,801	2,000	95,000
1995/96	300,581	288,481	16,000	316,581	13,611	224,770	2,000	76,200
1996/97 F	290,000	278,000	18,000	308,000	15,000	212,000	1,000	80,000
Italy								
1993/94	2,145,000	2,105,000	32,830	2,177,830	430,108	1,133,722	509,000	105,000
1994/95	2,153,000	2,113,000	39,000	2,192,000	488,000	1,228,000	450,000	26,000
1995/96	1,889,000	1,849,000	51,000	1,940,000	474,100	1,075,900	390,000	0
1996/97 F	2,100,000	2,060,000	40,000	2,140,000	490,000	1,200,000	450,000	0
Netherlands								
1993/94	670,000	603,000	252,876	922,876	448,765	365,111	84,000	25,000
1994/95	590,000	530,000	277,736	867,736	350,676	419,221	70,218	27,621
1995/96	595,000	535,000	330,000	925,000	520,000	308,356	71,644	25,000
1996/97 F	490,000	440,000	350,000	840,000	465,000	300,000	60,000	15,000
Spain								
1993/94	890,500	860,500	147,000	1,037,500	40,000	730,500	210,000	57,000
1994/95	739,400	714,400	143,400	882,800	34,800	682,000	141,000	25,000
1995/96	842,900	817,900	147,300	990,200	47,800	692,000	214,400	36,000
1996/97 F	875,100	850,100	129,600	1,004,700	50,100	690,000	210,000	54,600
Sweden								
1993/94	67,562	17,562	90,379	157,941	1,508	150,000	6,433	0
1994/95	70,000	20,000	90,000	160,000	1,500	151,500	7,000	0
1995/96	66,700	16,700	90,000	156,700	1,300	150,400	5,000	0
1996/97 F	66,700	16,700	90,000	156,700	1,300	151,400	4,000	0
United Kingdom								
1993/94	324,600	324,600	418,897	743,497	55,895	650,999	35,706	897
1994/95	275,892	275,892	434,809	710,701	53,101	626,480	30,348	772
1995/96	198,721	198,721	488,410	687,131	36,938	627,517	21,859	817
1996/97 F	183,843	183,843	512,830	696,673	42,210	633,588	20,223	652

TABLE 1
APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country Mktg. Year 1/	Total Production	Commercial Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
SUBTOTAL EU								
1993/94	9,153,918	7,880,540	1,886,567	11,040,485	1,859,559	6,019,370	2,303,501	858,055
1994/95	9,287,938	7,681,138	1,867,717	11,155,655	1,857,986	6,378,860	2,319,746	599,063
1995/96	8,257,537	7,033,642	2,367,659	10,625,196	2,323,458	5,790,415	2,278,576	232,747
1996/97 F	8,504,531	7,085,931	2,325,830	10,830,361	2,115,410	6,054,276	2,448,923	211,752
OTHER NORTHERN HEMISPHERE COUNTRIES								
Bulgaria								
1993/94	109,858	82,000	23,397	133,255	639	55,000	60,616	17,000
1994/95	76,477	57,400	16,159	92,636	597	44,600	38,239	9,200
1995/96	80,000	62,400	9,000	89,000	350	45,000	34,650	9,000
1996/97 F	90,000	72,000	8,000	98,000	450	53,000	34,550	10,000
Canada								
1993/94	488,400	488,400	98,416	586,816	50,196	343,620	193,000	0
1994/95	553,483	553,483	100,952	654,435	76,762	357,673	220,000	0
1995/96	590,834	590,834	100,734	691,568	98,978	362,590	230,000	0
1996/97 F	560,000	560,000	105,000	665,000	85,000	365,000	215,000	0
China, Peoples Republic of								
1993/94	9,070,000	6,350,000	1,049	9,071,049	119,418	8,497,631	454,000	0
1994/95	11,125,000	7,787,500	3,438	11,128,438	107,212	10,464,976	556,250	0
1995/96	14,008,000	9,807,000	14,000	14,022,000	109,000	13,301,125	611,875	0
1996/97 F	16,700,000	11,200,000	15,000	16,715,000	120,000	15,795,000	800,000	0
Hungary								
1993/94	819,000	426,000	0	819,000	231,000	298,000	290,000	0
1994/95	610,000	330,000	3,400	613,400	101,200	162,200	350,000	0
1995/96	353,000	250,000	45,000	398,000	34,000	131,000	233,000	0
1996/97 F	475,000	280,000	12,000	487,000	70,000	165,000	252,000	0
Japan								
1993/94	1,011,000	928,700	50	1,011,050	2,140	828,010	180,900	0
1994/95	989,300	909,700	8,900	998,200	1,800	814,000	182,400	0
1995/96	963,300	879,100	1,089	964,389	2,506	798,883	163,000	0
1996/97 F	936,200	852,700	5,500	941,700	2,000	789,700	150,000	0
Mexico								
1993/94	538,000	468,000	160,000	698,000	0	578,000	120,000	0
1994/95	488,000	438,000	80,000	568,000	0	483,000	85,000	0
1995/96	427,000	387,000	80,000	507,000	0	437,000	70,000	0
1996/97 F	466,000	436,000	83,000	549,000	0	479,000	70,000	0
Norway								
1993/94	58,559	27,390	33,335	91,894	0	71,648	9,932	10,314
1994/95	45,291	16,593	42,354	87,645	0	67,344	2,700	17,601
1995/96	52,559	22,596	39,344	91,903	0	67,646	3,042	21,215
1996/97 F	48,956	19,710	40,000	88,956	0	66,566	3,000	19,390
Poland								
1993/94	1,842,000	1,500,000	44,000	1,886,000	176,000	560,000	1,150,000	0
1994/95	1,441,000	1,241,000	26,560	1,467,560	115,100	354,460	998,000	0
1995/96	1,288,000	1,088,000	25,571	1,313,571	138,950	394,621	780,000	0
1996/97 F	1,500,000	1,300,000	20,000	1,520,000	150,000	400,000	970,000	0
Romania								
1993/94	1,097,158	972,158	7,000	1,104,158	60,000	864,158	150,000	30,000
1994/95	525,000	450,000	7,000	532,000	30,000	410,000	77,000	15,000
1995/96	500,000	420,000	7,900	507,900	40,000	372,900	85,000	10,000
1996/97 F	470,000	400,000	5,000	475,000	30,000	333,000	100,000	12,000
Russian Federation								
1993/94	1,425,000	1,070,000	175,000	1,600,000	0	720,000	480,000	400,000
1994/95	1,154,000	804,000	423,960	1,577,960	1,520	744,600	503,700	328,140
1995/96	1,050,000	710,000	407,350	1,457,350	310	710,000	450,500	296,540
1996/97 F	1,150,000	795,000	435,000	1,585,000	1,000	715,000	470,000	399,000

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(METRIC TONS)

Country Mktg. Year 1/	Total Production	Commercial Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
Serbia/Montenegro								
1993/94	190,000	135,000	0	190,000	0	156,000	34,000	0
1994/95	148,000	103,000	0	148,000	0	103,000	45,000	0
1995/96	141,000	96,000	12,000	153,000	0	94,000	59,000	0
1996/97 F	152,000	105,000	1,000	153,000	0	101,000	52,000	0
Slovakia								
1993/94	112,000	107,000	0	112,000	17,000	65,000	30,000	0
1994/95	57,000	53,000	14,400	71,400	4,400	54,000	13,000	0
1995/96	38,100	35,100	800	38,900	400	32,500	6,000	0
1996/97 F	54,000	50,000	1,000	55,000	500	45,500	9,000	0
Taiwan								
1993/94	8,128	8,128	107,544	115,672	0	115,672	0	0
1994/95	8,469	8,469	131,744	140,213	23	140,190	0	0
1995/96	9,482	9,482	110,433	119,915	0	119,915	0	0
1996/97 F	9,913	9,913	130,000	139,913	0	139,913	0	0
Turkey								
1993/94	2,080,000	2,080,000	36,795	2,116,795	30,676	1,982,119	104,000	0
1994/95	2,095,000	2,095,000	8,378	2,103,378	30,021	1,968,607	104,750	0
1995/96	2,100,000	2,100,000	1,000	2,101,000	30,000	1,966,000	105,000	0
1996/97 F	2,100,000	2,100,000	1,000	2,101,000	30,000	1,966,000	105,000	0
United States 2/								
1993/94	4,846,500	4,846,500	111,075	4,957,575	608,577	2,330,510	2,018,488	0
1994/95	5,216,600	5,216,600	126,404	5,343,004	697,829	2,392,995	2,252,180	0
1995/96	4,801,281	4,801,281	168,729	4,970,010	562,555	2,345,059	2,062,396	0
1996/97 F	4,732,790	4,732,790	210,000	4,942,790	675,000	2,392,790	1,875,000	0
SUBTOTAL OTHER NORTHERN HEMISPHERE COUNTRIES								
1993/94	23,695,603	19,489,276	797,661	24,493,264	1,295,646	17,465,368	5,274,936	457,314
1994/95	24,532,620	20,063,745	993,649	25,526,269	1,166,464	18,561,645	5,428,219	369,941
1995/96	26,402,556	21,258,793	1,022,950	27,425,506	1,017,049	21,178,239	4,893,463	336,755
1996/97 F	29,444,859	22,913,113	1,071,500	30,516,359	1,163,950	23,806,469	5,105,550	440,390
TOTAL NORTHERN HEMISPHERE COUNTRIES								
1993/94	32,849,521	27,369,816	2,684,228	35,533,749	3,155,205	23,484,738	7,578,437	1,315,369
1994/95	33,820,558	27,744,883	2,861,366	36,681,924	3,024,450	24,940,505	7,747,965	969,004
1995/96	34,660,093	28,292,435	3,390,609	38,050,702	3,340,507	26,968,654	7,172,039	569,502
1996/97 F	37,949,390	29,999,044	3,397,330	41,346,720	3,279,360	29,860,745	7,554,473	652,142
SOUTHERN HEMISPHERE COUNTRIES								
Argentina								
1993/94	1,006,384	1,006,384	5,465	1,011,849	146,799	310,000	555,050	0
1994/95	1,146,000	1,146,000	6,206	1,152,206	243,320	282,000	626,886	0
1995/96	1,147,000	1,147,000	4,000	1,151,000	201,000	367,000	583,000	0
1996/97 F	1,276,400	1,276,400	4,000	1,280,400	220,000	384,400	676,000	0
Australia								
1993/94	307,000	307,000	0	307,000	28,637	158,363	120,000	0
1994/95	345,000	345,000	0	345,000	40,930	169,500	134,570	0
1995/96	279,000	279,000	0	279,000	25,000	149,000	105,000	0
1996/97 F	369,000	369,000	0	369,000	40,000	175,000	154,000	0
Brazil								
1993/94	456,800	456,800	87,682	544,482	30,145	494,337	20,000	0
1994/95	483,200	483,200	245,032	728,232	12,085	676,147	40,000	0
1995/96	527,400	527,400	450,000	977,400	12,000	845,400	120,000	0
1996/97 F	575,000	575,000	500,000	1,075,000	25,000	1,020,000	30,000	0

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(METRIC TONS)

Country Mktg. Year 1/	Total Production	Commercial Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
Chile								
1993/94	800,000	790,000	0	800,000	346,700	90,000	363,300	0
1994/95	860,000	850,000	0	860,000	432,600	92,000	335,400	0
1995/96	910,000	900,000	0	910,000	433,000	92,000	385,000	0
1996/97 F	940,000	930,000	0	940,000	440,000	93,000	407,000	0
New Zealand								
1993/94	438,000	383,000	384	438,384	219,000	53,000	166,384	0
1994/95	480,700	431,700	94	480,794	321,900	53,000	105,894	0
1995/96	547,200	502,200	90	547,290	324,000	53,000	170,290	0
1996/97 F	480,000	440,000	50	480,050	273,000	50,000	157,050	0
South Africa, Republic of								
1993/94	637,692	637,692	0	637,692	224,731	225,844	187,117	0
1994/95	576,737	576,737	0	576,737	213,780	209,693	153,264	0
1995/96	702,500	702,500	0	702,500	208,750	246,250	247,500	0
1996/97 F	675,000	675,000	0	675,000	220,000	235,000	220,000	0
TOTAL SOUTHERN HEMISPHERE COUNTRIES								
1993/94	3,645,876	3,580,876	93,531	3,739,407	996,012	1,331,544	1,411,851	0
1994/95	3,891,637	3,832,637	251,332	4,142,969	1,264,615	1,482,340	1,396,014	0
1995/96	4,113,100	4,058,100	454,090	4,567,190	1,203,750	1,752,650	1,610,790	0
1996/97 F	4,315,400	4,265,400	504,050	4,819,450	1,218,000	1,957,400	1,644,050	0
WORLD GRAND TOTAL								
1993/94	36,495,397	30,950,692	2,777,759	39,273,156	4,151,217	24,816,282	8,990,288	1,315,369
1994/95	37,712,195	31,577,520	3,112,698	40,824,893	4,289,065	26,422,845	9,143,979	969,004
1995/96	38,773,193	32,350,535	3,844,699	42,617,892	4,544,257	28,721,304	8,782,829	569,502
1996/97 F	42,264,790	34,264,444	3,901,380	46,166,170	4,497,360	31,818,145	9,198,523	652,142

1/ Data for Northern Hemisphere countries are for a July/June marketing year, except for Mexico and France which are August/July. In the Southern Hemisphere the marketing year begins on January 1 of the second year indicated, except for Chile where the year starts on February 1 of the second year indicated, and New Zealand where the year starts in October 1 of the first year indicated. For Austria, processing apples are not included in production.
2/ U.S. import/export estimates based on U.S. Census of the Bureau data, through December 1996, and trade contacts, comparing trends this season with the same period in 1995 (July-December).
F= Forecast

U.S. APPLE EXPORTS
MARKETING YEARS 1989/90-1995/96
(JULY-JUNE)
METRIC TONS

COUNTRIES OF DESTINATION	1996 RANK	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96	% CHANGE 1995-96
Taiwan	1	67,484	60,839	77,262	113,733	99,053	115,342	101,650	-11.87
Mexico	2	11,203	10,465	66,861	99,364	152,059	87,269	80,802	-7.41
Canada	3	66,618	74,885	68,658	83,089	80,913	80,941	78,790	-2.66
Hong Kong	4	40,556	41,240	45,219	47,234	61,585	74,782	49,741	-33.48
Indonesia	5	786	2,642	8,869	10,855	21,648	43,268	49,455	14.30
Thailand	6	13,128	15,090	18,915	18,081	31,005	34,223	27,217	-20.47
United Kingdom	7	25,542	34,919	55,073	19,909	22,143	28,090	22,740	-19.05
Malaysia	8	4,723	7,020	11,086	9,680	17,135	20,216	16,634	-17.72
Philippines	9	15,681	4,349	7,862	8,164	11,510	16,522	16,258	-1.60
Brazil	10	134	2,993	384	621	1,513	21,751	13,207	-39.28
Saudi Arabia	11	17,012	21,292	23,436	14,811	19,145	28,219	13,014	-53.88
Singapore	12	12,284	12,414	16,088	10,846	15,193	19,056	10,602	-44.36
Russian Federation	13	0	0	0	0	5,958	9,805	8,714	-11.13
United Arab Emirates	14	8,597	4,565	7,354	4,647	7,720	17,311	7,676	-55.66
Colombia	15	3,808	3,263	3,066	5,393	4,402	10,189	7,142	-29.90
Costa Rica	16	2,838	3,670	3,220	5,251	6,350	6,871	5,741	-16.44
Guatemala	17	70	113	197	565	1,938	2,281	5,402	136.85
Finland	18	5,401	4,187	7,964	2,311	1,114	3,190	4,523	41.78
Venezuela	19	512	14,932	11,898	10,250	11,849	7,864	4,435	-43.61
Sweden	20	9,068	11,479	17,833	3,283	3,192	4,967	3,943	-20.61
Dominican Republic	21	1,543	712	1,334	2,037	3,266	3,657	3,771	3.10
Kuwait	22	1,016	22	638	1,038	2,329	3,710	2,777	-25.13
Vietnam	23	0	0	0	0	463	2,832	2,324	-17.94
Panama	24	2,445	2,545	2,246	2,283	3,153	3,194	2,116	-33.75
Ecuador	25	83	0	337	634	2,206	5,004	2,034	-59.35
Egypt	26	0	0	0	0	896	2,716	1,969	-27.52
Iceland	27	1,356	1,268	1,796	1,311	1,487	1,954	1,589	-18.72
Ireland	28	1,391	2,102	3,916	1,970	1,689	2,283	1,554	-31.94
Israel	29	0	0	0	0	0	5,440	1,459	-73.19
Japan	30	98	209	276	144	615	10,450	1,403	-86.58
China, Peoples Repub	31	306	0	40	222	379	885	1,377	55.53
Honduras	32	1,098	887	768	1,064	2,019	1,281	1,343	4.86
French West Indies	33	304	1,165	1,822	692	576	555	926	66.83
Sri Lanka	34	41	47	209	332	689	1,085	858	-20.89
Netherlands	35	5,592	6,991	9,449	556	4,055	2,055	832	-59.51
Trinidad and Tobago	36	0	1,346	379	419	409	550	817	48.49
Greece	37	0	0	3,247	241	2,565	2,206	801	-63.67
Haiti	38	292	122	48	0	68	640	601	-6.15
El Salvador	39	631	588	1,545	1,611	933	578	561	-2.95
Norway	40	2,940	4,695	6,895	1,411	334	189	514	172.06

U.S. APPLE EXPORTS
MARKETING YEARS 1989/90-1995/96
(JULY-JUNE)
METRIC TONS

COUNTRIES OF DESTINATION	1996 RANK	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96	% CHANGE 1995-96
Spain	41	0	0	4,659	232	115	3,387	482	-85.76
Bangladesh	42	132	20	219	184	281	817	470	-42.52
Jamaica & Dep	43	2	0	0	4	27	52	444	755.23
French Pacific Islan	44	529	401	663	359	327	379	438	15.51
Belgium-Luxembourg	45	16	1,211	6,965	128	338	554	418	-24.57
Uruguay	46	0	165	0	9	66	71	337	373.68
Barbados	47	411	453	428	130	257	420	248	-40.85
Guyana	48	0	0	17	216	551	275	244	-11.30
Netherlands Antilles	49	1,197	1,031	1,348	857	559	474	236	-50.14
Cambodia	50	0	0	0	0	54	426	223	-47.77
Argentina	51	0	0	0	0	0	74	211	184.36
Peru	52	0	0	14	0	0	348	200	-42.63
Nicaragua	53	0	176	301	558	180	175	163	-6.75
Germany	54	317	16	2,486	19	0	47	149	215.23
New Zealand	55	3,163	10	283	1,363	143	105	125	19.80
Other Pacific Island	56	131	117	113	110	175	45	124	178.18
Australia	57	0	0	0	0	8	8	82	881.33
Malta & Gozo	58	0	0	0	0	0	54	70	29.19
Chile	59	0	17	0	0	46	11	64	501.17
French Guiana	60	48	102	178	95	59	60	63	4.77
Jordan	61	0	0	0	0	0	0	60	N/A
Leeward-Windward Isl	62	174	225	118	64	56	52	59	13.04
Yemen	63	19	0	0	58	37	0	56	N/A
Bermuda	64	935	522	456	244	156	78	46	-40.73
Bahamas, The	65	183	188	18	33	9	67	44	-33.69
Belize	66	90	92	103	103	127	187	43	-77.20
Cayman Islands	67	0	18	0	27	49	10	39	290.00
Portugal	68	868	444	753	41	656	37	37	-0.00
India	69	0	0	0	0	20	7	35	389.85
Mauritius	70	0	0	0	0	0	0	17	N/A
Korea, Republic of	71	0	0	345	25	57	189	16	-91.78
Denmark	72	15	0	265	0	0	0	0	N/A
France	73	92	1,295	3,819	18	379	1,684	0	-100.00
Italy	74	0	0	3,690	0	41	4,107	0	-100.00
Bahrain	76	343	59	95	266	236	118	0	-100.00
Qatar	77	0	0	0	74	0	0	0	N/A
Yemen (Aden)	78	0	0	0	0	0	72	0	-100.00
Marshal Islands	79	5	0	0	0	0	0	0	N/A
Papua New Guinea	80	7	8	0	0	0	0	0	N/A

U.S. APPLE EXPORTS
MARKETING YEARS 1989/90-1995/96
(JULY-JUNE)
METRIC TONS

COUNTRIES OF DESTINATION	1996 RANK	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96	% CHANGE 1995-96
Western Samoa	81	2	0	0	13	0	0	0	N/A
Angola	82	24	62	6	0	0	0	0	N/A
Guinea	83	34	23	24	16	0	0	0	N/A
South Africa, Republ	84	0	56	406	19	0	0	0	N/A
Burma	85	0	0	0	9	0	0	0	N/A
Switzerland	86	0	47	0	0	9	0	0	N/A
Surinam	87	6	0	26	21	0	0	0	N/A
Pakistan	88	0	0	0	0	0	14	0	-100.00
TOTAL Other Asia	.....	155,046	143,802	185,963	218,994	258,699	338,193	276,899	-18.12
TOTAL North America	.....	77,821	85,350	135,520	182,453	232,972	168,210	159,592	-5.12
TOTAL European Union	.....	48,300	62,643	120,120	28,708	36,288	52,609	35,480	-32.56
TOTAL South America	.....	4,590	21,472	15,921	17,238	20,693	45,646	27,936	-38.80
TOTAL Middle East	.....	26,987	25,938	31,523	20,894	29,467	54,870	25,042	-54.36
TOTAL Central America	.....	7,173	8,072	8,379	11,436	14,700	14,567	15,370	5.51
TOTAL Former Soviet Union	.....	0	10	0	0	5,958	9,805	8,714	-11.13
TOTAL Caribbean	.....	5,041	5,783	5,951	4,505	5,433	6,555	7,231	10.31
TOTAL Other West Europe	.....	4,296	6,010	8,690	2,722	1,829	2,198	2,173	-1.14
TOTAL North Africa	.....	0	0	0	0	896	2,716	1,969	-27.52
TOTAL South Asia	.....	173	67	428	517	989	1,923	1,363	-29.15
TOTAL Oceania	.....	3,837	535	1,058	1,845	653	537	770	43.35
TOTAL Other Africa	.....	58	141	436	35	0	0	17	N/A
GRAND TOTAL		333,322	359,824	513,989	489,346	608,577	697,829	562,555	-19.38

SOURCE: U.S. DEPARTMENT OF COMMERCE, CENSUS OF THE BUREAU

WORLD FRESH PEAR SITUATION AND U.S. EXPORT PROSPECTS

Pear production in the world's leading producing countries in 1996/97 is forecast at 5.95 million metric tons, up 3 percent from 1995/96. World pear exports in 1996/97 are expected to approximate the previous year's level. However, the Northern Hemisphere export forecast was reduced 4 percent to 695,000 tons based on reductions in the United States and the EU pear crops. The U.S. pear export forecast for 1996/97 is reduced 15 percent due to smaller exportable supplies and stronger demand for processing. Pear exports from Southern Hemisphere countries in 1996/97, on the other hand, are forecast at 545,800 tons, up 7 percent from 1995/96 shipments. Exports from Argentina, the leading exporter in the Southern Hemisphere, Chile, and South Africa are expected to expand in 1996/97.

Summary

World pear supplies to increase slightly in 1996/97

World pear production in 1996/97 is forecast at 5.95 million metric tons, up 3 percent from 1995/96. Pear production in major producing countries of the Northern Hemisphere in 1996/97 is forecast at 4.69 million tons, down slightly from the November forecast (see November issue of *World Horticultural Trade & U.S. Export Opportunities*). The downturn from November mainly reflects a reduction in European output, especially in France and Spain. The Southern Hemisphere pear crop for the 1996/97 season (crop harvested in early-1997) is forecast at 1.26 million tons, 7 percent above the 1995/96 output. Increased production prospects in Argentina, Chile, and South Africa will likely more than offset reduced crops in Australia and New Zealand.

Northern Hemisphere pear exports are expected to decrease in 1996/97

World pear exports in 1996/97 are forecast at 1.24 million tons, practically unchanged from the 1.25 million tons exported last season. Increased Southern Hemisphere pear exports are expected to nearly offset reduced Northern Hemisphere shipments. Northern Hemisphere pear exports in 1996/97 are forecast at 695,140 tons, down 6 percent from last season due to reduced output in leading European Union (EU) exporting countries and the United States. The EU and the United States combined normally account for more than 90 percent of Northern Hemisphere pear exports. Intra-EU trade accounts for most of the EU pear exports.

Pear exports from Southern Hemisphere countries in 1996/97 are forecast at 545,800 tons, up 7 percent from 1995/96 shipments. Exports from Argentina, the leading exporter in the Southern Hemisphere, are forecast to increase to 250,000 tons, as favorable weather has improved overall pear production and supplies. Pear exports from Chile, the second largest supplier in the Southern Hemisphere, are also forecast to increase in 1996/97.

U.S. pear exports in 1996/97 revised down

U.S. pear exports in 1996/97 have been revised down to 115,000 tons, 20 percent below last season's record shipments. Decreased production in the states of Washington and Oregon, major U.S. pear exporters, combined with improved domestic prices for processing pears, have reduced overall U.S. export prospects in 1996/97. From July to December 1996, U.S. pear exports reached

83,860 tons, down 10 percent from shipments the same period in 1995.

U.S. pear exports reached a record 143,313 tons in 1995/96, valued at $82.6 million. Sales to Canada, the largest U.S. market, expanded from $27.4 million in 1994/95 to $31.6 million in 1995/96. However, sales to Mexico, the second largest market, fell from $22.1 million in 1994/95 to $14.4 million in 1995/96 as imports in the first half of the marketing year were adversely affected by the December 1994 peso devaluation. Sales to Brazil, the third largest U.S. market, more than doubled from $4.0 million in 1994/95 to $9.5 million in 1995/96. Taiwan has also been a consistent growth market as well as being the 4th-leading market for U.S. pears. Exports in 1995/96 totaled 11,438 tons valued at $5 million, up 33 percent and 29 percent, respectively.

(For further information on supply, distribution, and trade, contact Samuel Rosa at 202-720-6086. For information on production, contact Kelly Stzelecki at 202-720-6791.)

TABLE 1
PEARS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country Mktg. Year 1/	Total Production	Commercial Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
NORTHERN HEMISPHERE COUNTRIES								
EUROPEAN UNION (EU)								
Austria								
1993/94	44,000	8,900	17,000	61,000	0	61,000	0	0
1994/95	37,600	7,300	22,400	60,000	0	60,000	0	0
1995/96	46,500	6,100	18,000	64,500	2,500	61,000	1,000	0
1996/97 F	36,500	6,300	28,500	65,000	2,000	62,000	1,000	0
Belgium-Luxembourg								
1993/94	147,020	146,858	20,645	167,665	100,369	52,788	7,500	7,008
1994/95	155,090	154,540	14,452	169,542	99,826	58,586	8,000	3,130
1995/96	157,285	156,955	48,741	206,026	98,957	92,600	12,000	2,469
1996/97 F	138,500	138,200	18,000	156,500	87,500	60,500	6,000	2,500
Denmark								
1993/94	8,200	6,200	8,000	16,200	200	15,950	0	50
1994/95	7,800	5,800	8,500	16,300	200	16,050	0	50
1995/96	7,400	5,600	9,134	16,534	112	16,372	0	50
1996/97 F	7,500	5,700	9,000	16,500	100	16,350	0	50
France								
1993/94	251,100	245,500	108,000	359,100	57,600	249,900	45,000	6,600
1994/95	343,600	336,800	84,200	427,800	80,200	279,500	45,000	23,100
1995/96	308,600	302,600	80,000	388,600	68,000	252,600	45,000	23,000
1996/97 F	313,000	307,000	85,000	398,000	75,000	260,000	45,000	18,000
Germany								
1993/94	414,000	43,000	165,320	579,320	7,619	280,320	290,501	880
1994/95	418,700	38,700	166,994	585,694	6,026	292,821	286,675	172
1995/96	419,500	39,500	185,224	604,724	11,000	264,500	329,024	200
1996/97 F	436,000	36,000	160,000	596,000	8,000	270,000	318,000	0
Greece								
1993/94	81,045	78,615	2,857	83,902	170	70,407	8,365	4,960
1994/95	72,995	70,805	9,004	81,999	657	68,872	10,550	1,920
1995/96	55,500	53,830	13,000	68,500	610	59,640	7,700	550
1996/97 F	65,000	63,000	10,000	75,000	500	67,750	6,250	500
Italy								
1993/94	938,000	878,000	79,174	1,017,174	153,463	723,711	130,000	10,000
1994/95	1,022,000	962,000	153,000	1,175,000	177,000	881,000	110,000	7,000
1995/96	958,000	900,000	93,800	1,051,800	149,200	792,600	110,000	0
1996/97 F	1,048,000	988,000	105,000	1,153,000	170,000	873,000	110,000	0
Netherlands								
1993/94	170,000	153,000	86,339	256,339	154,421	96,718	4,000	1,200
1994/95	140,000	125,000	84,344	224,344	141,728	79,200	1,092	2,324
1995/96	165,000	148,000	90,000	255,000	180,000	70,680	3,320	1,000
1996/97 F	130,000	117,000	85,000	215,000	131,000	80,000	3,000	1,000
Spain								
1993/94	474,600	455,400	31,100	505,700	40,400	436,800	20,000	8,500
1994/95	543,000	518,000	21,000	564,000	77,500	439,000	22,500	25,000
1995/96	469,000	454,000	41,000	510,000	65,500	415,700	20,800	8,000
1996/97 F	571,100	551,100	15,000	586,100	82,400	420,000	21,100	62,600
Sweden								
1993/94	8,593	2,593	29,083	37,676	262	37,414	0	0
1994/95	5,800	1,000	30,000	35,800	260	35,540	0	0
1995/96	6,300	1,300	29,000	35,300	260	35,040	0	0
1996/97 F	6,300	1,300	29,000	35,300	250	35,050	0	0

TABLE 1
PEARS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country Mktg. Year 1/	Total Production	Commercial Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
United Kingdom								
1993/94	43,800	43,800	91,500	135,300	2,760	130,913	876	751
1994/95	25,846	25,846	106,500	132,346	1,550	130,229	516	51
1995/96	34,846	34,846	112,379	147,225	3,738	142,537	697	253
1996/97 F	38,810	38,810	108,925	147,735	3,345	143,391	776	223
SUBTOTAL EU								
1993/94	2,580,358	2,061,866	639,018	3,219,376	517,264	2,155,921	506,242	39,949
1994/95	2,772,431	2,245,791	700,394	3,472,825	584,947	2,340,798	484,333	62,747
1995/96	2,627,931	2,102,731	720,278	3,348,209	579,877	2,203,269	529,541	35,522
1996/97 F	2,790,710	2,252,410	653,425	3,444,135	560,095	2,288,041	511,126	84,873
OTHER NORTHERN HEMISPHERE COUNTRIES								
Bulgaria								
1993/94	21,006	6,000	175	21,181	66	10,115	10,000	1,000
1994/95	33,009	9,000	206	33,215	58	13,000	17,657	2,500
1995/96	21,500	5,000	150	21,650	30	7,602	11,868	2,150
1996/97 F	21,000	4,800	100	21,100	25	7,800	11,175	2,100
Canada								
1993/94	18,126	18,126	54,442	72,568	452	68,027	4,089	0
1994/95	15,793	15,793	59,556	75,349	86	69,420	5,843	0
1995/96	11,325	11,325	58,638	69,963	713	64,250	5,000	0
1996/97 F	16,000	16,000	55,000	71,000	500	65,200	5,300	0
Japan								
1993/94	396,300	365,200	0	396,300	7,280	388,550	470	0
1994/95	431,100	398,200	0	431,100	3,800	426,760	540	0
1995/96	400,300	368,200	17	400,317	6,121	393,696	500	0
1996/97 F	429,400	395,900	0	429,400	6,500	422,400	500	0
Mexico								
1993/94	39,500	35,500	57,000	96,500	0	94,000	2,500	0
1994/95	30,000	26,000	46,800	76,800	0	74,800	2,000	0
1995/96	28,000	26,000	29,000	57,000	0	56,000	1,000	0
1996/97 F	27,400	25,400	30,000	57,400	0	56,400	1,000	0
Norway								
1993/94	2,915	1,461	15,450	18,365	0	16,497	0	1,868
1994/95	3,185	1,675	13,856	17,041	0	15,606	0	1,435
1995/96	3,263	1,715	15,096	18,359	0	16,825	105	1,429
1996/97 F	2,419	1,062	15,000	17,419	0	16,362	0	1,057
Russian Federation								
1993/94	0	0	0	0	0	0	0	0
1994/95	36,000	22,000	47,100	83,100	30	75,000	8,000	70
1995/96	189,000	133,000	133,750	322,750	20	275,000	45,000	2,730
1996/97 F	215,000	150,000	150,000	365,000	20	296,000	62,000	6,980
Serbia/Montenegro								
1993/94	78,000	59,000	0	78,000	0	61,000	17,000	0
1994/95	73,000	56,000	0	73,000	0	53,000	20,000	0
1995/96	67,000	51,000	0	67,000	0	40,000	27,000	0
1996/97 F	72,000	54,000	0	72,000	0	45,000	27,000	0
Turkey								
1993/94	420,000	420,000	0	420,000	6,444	392,556	21,000	0
1994/95	410,000	410,000	56	410,056	8,336	381,220	20,500	0
1995/96	410,000	410,000	0	410,000	13,000	376,500	20,500	0
1996/97 F	410,000	410,000	0	410,000	13,000	376,500	20,500	0
United States 2/								
1993/94	860,300	860,300	65,509	925,809	128,332	399,020	398,457	0
1994/95	949,052	949,052	48,038	997,090	134,774	413,758	448,558	0
1995/96	860,240	860,240	57,341	917,581	143,313	408,636	365,632	0
1996/97 F	706,500	706,500	80,000	786,500	115,000	385,100	286,400	0

TABLE 1
PEARS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country Mktg. Year 1//	Total Production	Commercial Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
SUBTOTAL OTHER NORTHERN HEMISPHERE COUNTRIES								
1993/94	1,836,147	1,765,587	192,576	2,028,723	142,574	1,429,765	453,516	2,868
1994/95	1,981,139	1,887,720	215,612	2,196,751	147,084	1,522,564	523,098	4,005
1995/96	1,990,628	1,866,480	293,992	2,284,620	163,197	1,638,509	476,605	6,309
1996/97 F	1,899,719	1,763,662	330,100	2,229,819	135,045	1,670,762	413,875	10,137
TOTAL NORTHERN HEMISPHERE COUNTRIES								
1993/94	4,416,505	3,827,453	831,594	5,248,099	659,838	3,585,686	959,758	42,817
1994/95	4,753,570	4,133,511	916,006	5,669,576	732,031	3,863,362	1,007,431	66,752
1995/96	4,618,559	3,969,211	1,014,270	5,632,829	743,074	3,841,778	1,006,146	41,831
1996/97 F	4,690,429	4,016,072	983,525	5,673,954	695,140	3,958,803	925,001	95,010
SOUTHERN HEMISPHERE COUNTRIES								
Argentina								
1993/94	406,922	406,922	1,446	408,368	142,567	115,801	150,000	0
1994/95	491,000	491,000	2,557	493,557	222,402	119,500	151,655	0
1995/96	513,000	513,000	2,000	515,000	235,000	157,000	123,000	0
1996/97 F	573,900	573,900	2,000	575,900	250,000	170,900	155,000	0
Australia								
1993/94	161,000	161,000	65	161,065	26,580	52,000	82,485	0
1994/95	155,215	155,215	70	155,285	22,228	69,214	63,843	0
1995/96	159,242	159,242	75	159,317	23,500	69,160	66,657	0
1996/97 F	155,800	155,800	75	155,875	23,000	69,200	63,675	0
Chile								
1993/94	232,000	230,000	0	232,000	156,800	55,200	20,000	0
1994/95	236,000	234,000	0	236,000	146,800	56,000	33,200	0
1995/96	252,000	250,000	0	252,000	164,000	56,000	32,000	0
1996/97 F	262,000	260,000	0	262,000	175,000	56,500	30,500	0
New Zealand								
1993/94	19,376	12,876	300	19,676	3,164	13,830	2,682	0
1994/95	19,358	12,858	94	19,452	4,424	12,500	2,528	0
1995/96	19,535	13,135	131	19,666	3,361	12,500	3,805	0
1996/97 F	16,000	11,000	300	16,300	2,800	12,000	1,500	0
South Africa, Republic of								
1993/94	252,815	252,815	0	252,815	87,555	43,910	121,350	0
1994/95	256,390	256,390	0	256,390	103,724	43,758	108,908	0
1995/96	242,500	242,500	0	242,500	85,000	46,250	111,250	0
1996/97 F	256,000	256,000	0	256,000	95,000	46,500	114,500	0
TOTAL SOUTHERN HEMISPHERE COUNTRIES								
1993/94	1,072,113	1,063,613	1,811	1,073,924	416,666	280,741	376,517	0
1994/95	1,157,963	1,149,463	2,721	1,160,684	499,578	300,972	360,134	0
1995/96	1,186,277	1,177,877	2,206	1,188,483	510,861	340,910	336,712	0
1996/97 F	1,263,700	1,256,700	2,375	1,266,075	545,800	355,100	365,175	0
WORLD GRAND TOTAL								
1993/94	5,488,618	4,891,066	833,405	6,322,023	1,076,504	3,866,427	1,336,275	42,817
1994/95	5,911,533	5,282,974	918,727	6,830,260	1,231,609	4,164,334	1,367,565	66,752
1995/96	5,804,836	5,147,088	1,016,476	6,821,312	1,253,935	4,182,688	1,342,858	41,831
1996/97 F	5,954,129	5,272,772	985,900	6,940,029	1,240,940	4,313,903	1,290,176	95,010

1/ Data for Northern Hemisphere countries are for a July/June marketing year, except for Mexico and France which are August/July. In the Southern Hemisphere the marketing year begins on January 1 of the second year indicated, except for Chile where the year starts on February of the second year indicated, and New Zealand where the year starts in October of the first year indicated.
2/ U.S. import/export estimates based on U.S. Census of the Bureau data, through December 1996, and trade contacts, comparing trends this season with the same period in 1995 (July-December).
F= Forecast

U.S. PEAR EXPORTS
MARKETING YEARS 1989/90-1995/96
(JULY-JUNE)
METRIC TONS

AREA/COUNTRIES OF DESTINATION	1996 RANK	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96	% CHANGE 1995-96
Canada	1	29,249	37,609	35,734	34,899	39,645	43,892	44,348	1.04
Mexico	2	27,125	23,611	31,066	34,222	53,629	46,838	28,430	-39.30
Brazil	3	1,031	4,167	2,013	950	1,571	8,882	21,747	144.84
Taiwan	4	1,063	2,076	6,884	6,157	8,059	8,547	11,438	33.82
Israel	5	0	0	0	0	0	347	4,978	1334.57
Sweden	6	8,251	9,822	9,733	5,790	6,231	4,599	4,836	5.18
Netherlands	7	6,077	4,533	2,309	1,232	3,453	2,070	4,390	112.12
Hong Kong	8	357	1,506	5,117	4,270	1,472	3,165	3,186	0.66
Colombia	9	72	76	315	667	299	1,901	2,711	42.65
Russian Federation	10	0	0	0	0	218	566	2,337	312.51
Venezuela	11	205	6,029	4,343	3,503	3,091	2,354	1,850	-21.40
United Arab Emirates	12	1,389	1,461	1,154	866	1,444	966	1,837	90.14
Saudi Arabia	13	2,930	2,348	3,066	2,683	3,546	2,654	1,710	-35.57
Panama	14	678	509	879	498	649	603	1,449	140.45
Indonesia	15	0	0	0	147	125	207	1,173	467.28
Singapore	16	225	477	533	523	616	847	1,096	29.46
Peru	17	0	0	0	0	0	465	765	64.45
United Kingdom	18	2,147	2,483	3,742	663	354	919	682	-25.80
Finland	19	786	453	719	370	185	568	610	7.50
Malaysia	20	0	80	27	231	179	304	491	61.71
Costa Rica	21	102	236	232	366	364	653	474	-27.48
Germany	22	909	469	1,689	242	874	424	445	4.88
Ecuador	23	0	0	55	96	111	351	438	24.79
Belgium-Luxembourg	24	20	616	1,203	47	0	0	359	N/A
Kuwait	25	171	0	215	184	276	233	234	0.28
Ireland	26	65	279	1,084	307	277	391	220	-43.78
Honduras	27	53	69	16	224	174	191	174	-8.90
Guatemala	28	21	11	136	195	458	460	150	-67.45
Iceland	29	0	34	74	36	0	22	133	503.36
Dominican Republic	30	73	56	46	55	86	174	130	-25.19
French Pacific Islan	31	69	64	141	176	88	85	99	16.31
Trinidad and Tobago	32	0	173	52	15	64	111	61	-44.66
Japan	33	52	36	17	19	108	326	57	-82.44
Bahrain	34	173	0	123	0	183	422	40	-90.54
Spain	35	0	0	0	0	0	0	40	N/A
Vietnam	36	0	0	0	0	0	0	39	N/A
China, Peoples Repub	37	0	0	0	0	11	20	37	85.18
Philippines	38	0	0	0	50	0	0	33	N/A
Guyana	39	0	0	0	3	0	0	20	N/A
Haiti	40	26	105	0	0	0	16	20	22.01
Thailand	41	0	0	0	139	12	0	18	N/A
Malta & Gozo	42	0	0	0	0	0	0	13	N/A
El Salvador	43	0	4	0	21	6	0	13	N/A
Bermuda	44	0	0	0	0	0	0	3	N/A
Bahamas, The	45	6	9	0	0	0	0	0	N/A
Barbados	46	18	0	0	0	0	0	0	N/A
French West Indies	47	6	3	4	0	0	0	0	N/A
Leeward-Windward Isl	48	60	17	12	5	0	0	0	N/A

U.S. PEAR EXPORTS
MARKETING YEARS 1989/90-1995/96
(JULY-JUNE)
METRIC TONS

AREA/COUNTRIES OF DESTINATION	1996 RANK	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96	% CHANGE 1995-96
Netherlands Antilles	49	97	20	0	3	0	0	0	N/A
Belize	50	0	20	0	0	0	0	0	N/A
Nicaragua	51	0	0	7	55	0	0	0	N/A
Denmark	52	0	0	402	132	0	19	0	-100.00
France	53	0	119	148	0	83	29	0	-100.00
Greece	54	0	0	0	0	218	0	0	N/A
Italy	55	73	146	119	0	0	79	0	-100.00
Qatar	56	0	88	0	0	0	0	0	N/A
Yemen	57	0	0	0	19	0	0	0	N/A
Egypt	58	0	0	0	0	37	0	0	N/A
Oceania									
Australia	59	0	4	0	0	0	5	0	-100.00
New Zealand	60	0	30	0	0	0	0	0	N/A
Other Pacific Island	61	26	10	0	16	0	0	0	N/A
Kenya	62	0	0	0	90	0	0	0	N/A
Mali	63	0	26	0	0	0	0	0	N/A
South Africa, Republ	64	0	0	57	0	0	0	0	N/A
Korea, Republic of	65	834	0	236	0	16	16	0	-100.00
Norway	66	788	1,011	1,013	192	111	56	0	-100.00
Uruguay	67	0	0	0	0	9	0	0	N/A
India	68	0	0	11	0	0	0	0	N/A
TOTAL North America	.....	56,374	61,220	66,800	69,121	93,273	90,730	72,778	-19.79
TOTAL South America	.....	1,308	10,273	6,726	5,218	5,081	13,953	27,532	97.32
TOTAL Other Asia	.....	2,530	4,174	12,814	11,536	10,597	13,431	17,568	30.81
TOTAL European Union	.....	18,328	18,920	21,147	8,783	11,674	9,096	11,582	27.32
TOTAL Middle East	.....	4,664	3,897	4,558	3,752	5,449	4,622	8,798	90.36
TOTAL Former Soviet Union	.....	0	0	0	0	218	566	2,337	312.51
TOTAL Central America	.....	854	850	1,269	1,358	1,652	1,906	2,259	18.50
TOTAL Caribbean	.....	285	383	114	78	151	301	214	-28.94
TOTAL Other West Europe	.....	788	1,046	1,087	228	111	78	146	87.44
TOTAL Oceania	.....	95	109	141	192	88	91	99	9.38
TOTAL North Africa	.....	0	0	0	0	37	0	0	N/A
TOTAL Other Africa	.....	0	26	57	90	0	0	0	N/A
TOTAL South Asia	.....	0	0	11	0	0	0	0	N/A
GRAND TOTAL		85,227	100,896	114,723	100,358	128,332	134,774	143,313	6.34

SOURCE: U.S. DEPARTMENT OF COMMERCE, CENSUS OF THE BUREAU

KIWIFRUIT SITUATION FOR SELECTED COUNTRIES

The world kiwifruit situation is characterized by bipolar production, with the harvest in the Northern Hemisphere (October-November) generally complementing supplies harvested in the Southern Hemisphere (April-June). Kiwifruit production and trade in 11 major producing countries have increased dramatically over the past decade, especially in the European Union (EU). By the beginning of the 1990s, production had far outpaced demand from the importing countries. This situation led to considerable vine-pulling and generally slower growth in planted area. In 1993/94 world production dropped from 954,300 tons to 887,720 tons. This year, world production finally surpassed the 1992/93 level, reaching 984,469 tons. The world area planted to kiwifruit continues to decline, dropping 4 percent from last year's level. Increases in world kiwifruit production combined with improved storage facilities and technology (e.g., controlled atmosphere storage) have allowed sales in the Northern and Southern Hemispheres to overlap, leading to downward price pressure. While devastating to many farmers, the lower level of prices has probably helped boost kiwifruit consumption around the world. World exports increased for the third year in a row. Last year exports from New Zealand exceeded those from Italy for the first time since 1991/92. This year exports from each of these countries are estimated at 230,000 tons.

Kiwifruit production and exports in 1996/97 are expected to increase slightly

Kiwifruit production in 11 countries in 1996/97 is forecast at 984,469 tons, 5 percent above last year's level. Exports in 1996/97 may reach 635,750 tons, up about 3 percent from the previous year. Exports are expected to increase from all exporting countries except the United States and France. Exports for the United States are expected to be down due to a smaller harvest. Italy and New Zealand are the world's largest exporters of kiwifruit, accounting for 36 percent of selected country 1996/97 forecast exports. Chile is the third largest shipper, accounting for 19 percent.

NORTHERN HEMISPHERE

The European Union (EU) is the world's most important kiwifruit growing region. Italy accounts for 70 percent of EU production. The EU greatly facilitated conversion of crop land to kiwifruit in the 1980s through widespread subsidies. Although most subsidies have reportedly been eliminated, their impact continues. Estimated production in 1996/97 for the 5 major EU producing countries is 478,500 tons, about 17 times the level estimated for the United States this season.

ITALY

Italy is the world's largest producer of kiwifruit

Italy accounts for more than half of total production from selected Northern Hemisphere countries in 1996/97. The 1996 crop is estimated at 330,000 tons, an increase of 14 percent from the previous year's output, due to excellent weather conditions. Area planted to kiwifruit has stabilized at 19,500 hectares, concentrated in the regions of Lazio (6,000 hectares), Emilia-Romaga (4,500 hectares), and Piedmont (4,500 hectares).

Kiwifruit consumption increased to about 120,000 tons due to higher supplies and lower prices

Kiwifruit consumption in Italy closely parallels production and prices. In general, the domestic market is very price-sensitive. The average per capita consumption is 1.8-2.0 kg. According to

the Italian Kiwifruit Producers Association (CIK), almost all kiwifruit are sold on the fresh fruit market, but 20 percent of the population is not familiar with the fruit. Generally, EU quality standards of kiwis do not apply to the domestic market. Consequently, most low quality fruit is sold at the street markets at low prices. There is very little further processing, although small quantities are diverted to confectioners and frozen fruit juice manufacturers.

Domestic consumption should be much higher than last year as there is an increase of about 26,000 tons of fruit available from domestic production. Prices, across the board from farm to export, are about 200 to 300 lira/kg, or 15 percent lower than last year.

Italy's exports forecast at a record level in 1996/97

Italian kiwifruit exports are forecast at 230,000 tons in 1996/97, up 6 percent from last year's shipments. The following table shows Italy's meteoric rise as a producer with only limited exportable surplus of kiwifruit in the mid-1980s.

Italy's Meteoric Rise as Kiwifruit Producer (Metric Tons)

Year	Area	Production	Exports	Imports
1986	8,969	55,000	11,000	4,000
1987	12,848	91,000	22,000	9,000
1988	15,926	124,000	45,000	12,000
1989	18,070	230,000	67,000	10,000
1990	19,758	275,000	108,000	13,000
1991	19,103	260,000	119,000	21,000
1992	20,000	374,000	169,000	19,000
1993	20,000	310,000	214,600	22,400
1994	19,500	280,000	202,000	23,000
1995	19,500	290,000	216,000	21,000
1996	19,500	330,000	230,000	20,000

Source: USDA/FAS report IT7004; 1996 trade data estimated.

Italy's primary export markets are other EU countries. In 1995, shipments to EU destinations accounted for about 89 percent of total exports. Prospects remain good for shipments to EU markets during the peak Northern Hemisphere shipment period.

Italy imports in off-season

Despite its dominant position in export markets, Italy is also an importer of kiwifruit during the off season from May through October. Italy imported 21,000 tons of kiwifruit in 1995/96, and is expected to take about the same quantity in the current marketing year. Chile and New Zealand are the major suppliers of imported kiwifruit to Italy. In view of the bipolar production season, Chile and New Zealand will remain the primary beneficiaries of import demand from Italy. However, in coming years the length of season for domestic fruit could be affected by technological advances in controlled atmosphere storage and forced maturation.

FRANCE

France is the EU's second largest kiwifruit producer, harvesting an estimated 77,000 tons in 1996/97. Although total production this year is about the same as last season, commercial production is 3,000 tons greater than last season's level. Much of the growth in total production over the last few years has been in the non-commercial sector. French kiwi production is described as not particularly profitable. French Customs data show that the country is a net importer of kiwifruit, taking 44 and 23 percent from New Zealand and Italy respectively.

France's main export markets are Spain and Germany which account for 30 and 20 percent of total exports. Taiwan is France's third largest country export market. Shipments doubled to Taiwan last season to more than 2,000 tons.

GREECE

Domestic production expands 23 percent

Production in 1996/97 is estimated at 50,000 tons, up 9,350 tons from last year due to abundant rainfall and relatively mild temperatures. This year's crop is described as "very good", consists of large sized fruit, and is of better quality than last year's crop.

Kiwifruit production is centered in Western and

Central Macedonia, particularly in the district of Pieria, which accounts for 1,900 hectares. Acreage is expected to remain at current levels of around 4,000 hectares. Nevertheless, because existing acreage has not reached full maturity, future harvests could reach 60,000 tons or more.

New cold storage capacity

The cold storage facility in Karitsa-Pellas doubled its capacity to total 5,000 tons. A new facility in Karyotisa-Pellas with a capacity of 5,000 tons is in operation for the first time this season, and another cooperative facility of 2,000 tons is presently under construction at Agios Spyridon-Artas.

Greek exports forecast up in 1996/97 based on increased supplies

Greek kiwifruit exports in 1996/97 are projected to increase by about 2,000 tons to total 22,000 tons. Export data from January through September 1996 indicate that about 75 percent of Greek kiwifruit exports were shipped to EU member states, the balance went to markets in Eastern Europe.

Prices of domestically produced kiwifruit are lower than last year. Last year the price in the central Athens market ranged between 180 and 400 drs/kg compared to 200 to 250 drs/kg this season.

Greece imports comparatively small quantities of kiwifruit in off-season

Greece imports only small quantities of kiwifruit, usually during July-September when locally produced kiwifruit are not available. Imports are forecast to reach about 1,000 tons in 1996/97. The import duty on kiwifruit from non-EU countries is generally 10.6 percent ad valorem. An 8 percent VAT is applied to the total CIF value plus import duties.

The Government of Greece, through regulation 2328/91, does not encourage new kiwi plantings. However it does provide assistance for improvements in established orchards. Currently there are no price supports for kiwifruit, and no subsidized producer credit is available.

PORTUGAL

Heavy rains and frosts continue to plague production

Production in 1996/97 is expected to decline again, for the fourth straight year, due to continued unfavorable growing conditions. This year's crop is expected to be down three percent from last year's level which was four percent off the 1994/95 level. Almost all of the area planted is now bearing fruit. In the long run, area expansion is not anticipated due to price competition from other EU suppliers and because consumers have a wider choice of other tropical and semi-tropical fruits.

Portugal is a net importer; declining prices have fueled demand

Consumer purchases of kiwifruit are influenced by prices and supplies of other fruit (apples in winter, bananas in summer). Appearance of fruit is reportedly an important factor influencing consumer purchases. Portugal is a net importer of kiwifruit and, in the coming year, is expected to purchase 9,100 tons primarily from Italy, France, and New Zealand in the current year.

Opportunities for U.S. exports to Portugal are not promising due to stiff competition from EU suppliers and the smaller U.S. crop.

Most kiwifruit is marketed through five companies, Frutas Douro ao Minho, Sokiwi, Kiwi-Iberica, Kiwisol and Kiwicoop. These companies are the main distributors of domestic production and deal directly with retailers, wholesalers and importers. They establish prices in accordance with supply and demand. Retailing is increasingly dominated by the super and hypermarkets, which account for almost 35 percent of all kiwifruit sold in Portugal.

SPAIN

Area declines for second straight year

Spain's area planted to kiwfruit decreased to 760

hectares in 1996/97, down from the high of 954 hectares in 1994/95. No increases are expected in the next few years. Galacia and Asturias (northwestern Spain) are the primary production areas, accounting for about 57 percent of total planted area. Most of the production units are small farms averaging between .5 and 1 hectare.

The decline in growing area is attributed to a switch to grape production for wine. Unless kiwifruit grower prices improve, there could be some pulling of kiwifruit vines in areas of mixed production (kiwifruit/grapes) and replanting with grapes. Wine grapes reportedly offer growers better returns than kiwifruit at current prices.

Last year's production fell nearly 3,000 tons to 8,332 tons. This year's crop, however, is forecast at 13,000 tons, up 56 percent due to ideal growing conditions.

Spain's imports outstrip production by over five-fold

Spain is primarily an importer of kiwifruit. Imports in 1996/97 are forecast at 50,000 tons, down 9 percent. Italy and France are the primary suppliers of kiwifruit to Spain, followed by New Zealand and Chile. Local kiwifruit are marketed by only a few Galicia-based firms, mainly from November through February. Imports from Italy and France usually take place November through May, while fruit from Chile and New Zealand typically arrive June through December. Imports from Chile receive preferential GSP duty treatment and do not have to pay the higher duty levied upon other countries. Although a ban on U.S. fresh fruit was lifted in mid-1993, prospects for U.S. kiwifruit in this market are limited given strong competition from low-price EU neighbors, the duty preferences received by other suppliers, and the fact that southern hemisphere fruit is available immediately before the U.S. fruit is harvested, enabling Spanish importers to build up temporary stocks.

JAPAN

Domestic production continues to decline and imports increase as lack of competitiveness erodes market share

Kiwifruit production in Japan for 1996/97 is estimated at 42,900 tons, a 12 percent decline from the previous year, due in large part to a continued reduction in area. Plantings declined in each of the last five years. During this period domestic production dropped from 53,800 tons.

The area decline was triggered by continued saturation of the kiwifruit market due to stagnant consumer demand and the decreasing competitiveness of local product relative to imports.

Japan is forecast to import 48,000 tons of kiwifruit in 1996/97, up from the preceding year by nearly 5,000 tons in response to lower domestic supplies. Imports come primarily from New Zealand, in large part due to its complementary season and proximity. New Zealand currently enjoys a 90 percent share of the import market. Interest in U.S. kiwifruit is usually limited, as it competes directly with local Japanese production. According to industry sources, Japan's future consumption of kiwifruit is not likely to exceed 100,000 tons.

Japanese Imports of Kiwifruit by Origin (Metric Tons)

Principal Suppliers	1994	1995	1996 (Jan-Oct)
United States	217	32	40
New Zealand	39,567	31,680	37,821
Chile	5,728	10,841	3,544
TOTAL	45,511	42,481	41,404

Source: Customs Bureau, Ministry of Finance (USDA/FAS report JA7002)

Average Import Prices of Kiwifruit by Origin (Yen per Kilogram, CIF 1/)

Supplier	1994	1995	1996 (Jan-Oct)
United States	271	na	na
New Zealand	218	209	206
Chile	121	114	97

Source: Customs Bureau, Ministry of Finance (USDA/FAS report JA7002)
1/ Average exchange rates (yen to one U.S. dollar): 1994=103; 1995=94; 1996=108.

The Tokyo wholesale price for domestic fruit in

December 1996 was 245 yen/kg and 330 for New Zealand product. Popular sizes are 36 to 39 per tray.

KOREA

Domestic production continues to grow but quality is poor

Domestic production of kiwifruit in 1996 is estimated at 13,000 tons, up seven percent from the previous year. A larger crop was produced on about the same area under production as last year. The quality of this year's crop is poor, and is expected to reduce the commercial value for the local market. The size of the fruit is smaller and it contains a high moisture level. The ratio of large sized fruit (above 100 gram/piece) is expected to be 20 percent compared to 30-40 percent in normal years. This year's growing cycle is described as low temperatures during the flowering and pollination period followed by dry weather during the growing season and wet weather during the harvest. All of this leads to fast maturation and soft fruit flesh.

Consumption continues to rise

Since 1990, consumption has increased by more than ten percent annually, rising from 6,000 tons to a projected 18,000 tons in 1996. Korean per capita consumption is estimated at 400 grams. The Seoul metropolitan area accounts for about 60 percent of total fresh consumption. Ten percent of the domestically produced fruit is processed into juice and products for use in the bakery and confectionery sector. Virtually all of the imported fruit is consumed fresh.

Imports continue to climb

Kiwifruit imports for 1995/96 increased to 6,300 tons, up 22 percent from the previous year. Shipments from the United States decreased by 27 percent due to a good harvest of local fruits. Imports from New Zealand increase by 57 percent due to the improved distributional channel. Major fruit importers anticipate that kiwifruit imports for 1996/97 will increase by 20 percent to 7,500 tons. The increase may largely come from New Zealand kiwifruit imports with U.S. kiwifruit remaining at the same level. The tariff for fresh kiwifruit is 48.5 percent for 1997, imposed on CIF value, and will be reduced by 0.5 percent per year through 2004 when the tariff will be bound at 45 percent.

Chile to initiate shipments

A new challenge is expected in the Korean market. Imports of Chilean kiwifruit have been prohibited by the Plant Protection Act due to Mediterranean fruit fly. However, the Korean government is considering permitting imports of kiwifruit from Chile on the condition that the fruit is subject to a cold treatment conducted by a cooperative inspection between visiting Korean officials and local officials. Importers expect to handle about 2,000 tons of Chilean kiwifruit this year. Chilean kiwifruit directly competes with New Zealand fruit during Korean off-season.

New Zealand dominates Korean import market

New Zealand dominates the imported kiwifruit market because at present it is Korea's only off-season source of kiwifruit. In 1995/96, New Zealand kiwifruits accounted for 75 percent of total imported fruits, while United States supplied the rest. New Zealand's market share has improved from 58 percent in 1995 to 75 percent in 1996. This is largely because the import channel for New Zealand kiwifruit has changed from sole agent (Hyundai Ag.) to multiple agents (three including Hyundai, Korean Kiwifruit Association, and Sooil Commerce Co.), which developed as a result of the Korean government's ban on private business monopolies. The competition among those three importers led to dumping sales, affecting prices of both local and imported fruits. While consumers' demand for higher fruit quality also continues to grow in the market, New Zealand fruit is preferred among retail consumers due to its large size, skin color, consistent shape, flesh firmness, and neat package (carton tray). However, there is minimal taste difference between domestic and imported fruits since they are from the same 'Hayward' cultivar.

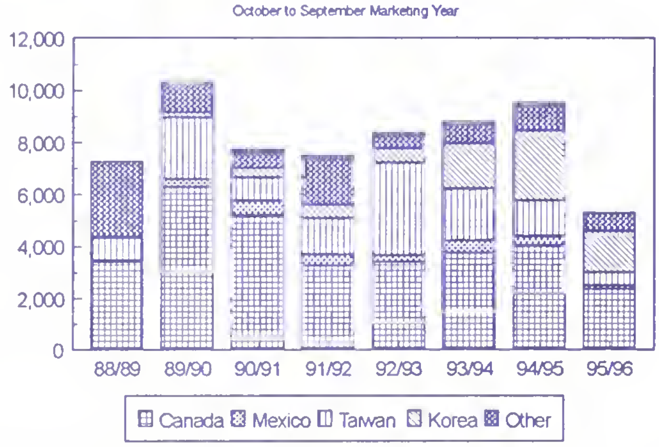
Difficulties for Korean imports of U.S. kiwifruit

U.S. kiwifruit is disadvantaged in terms of seasonal opportunity, in that it is higher priced and competes directly with local products. Imports of U.S. kiwifruit in 1995/96 decreased by 27 percent from the previous year, largely because of the abundant local harvest. U.S. kiwifruits must also compete against a national campaign for buying local agricultural products, unsubstantiated food safety scares by local consumer groups against imported food products, and restrictive import inspection procedures.

UNITED STATES

The U.S. commercial kiwifruit industry is based around Gridley in Butte County and in Tulare County in central California. Kiwifruit production in 1996/97 was 27,669 tons, a 20-percent decline from the previous year. This year's decline is due to lack of sufficient chilling hours between January and February. Normally kiwifruit require about 1,000 hours of temperatures under 45 degrees. Last year the California plantings received only 650 hours. As a result erratic flowering occurred. The plants require a consistent bud break for both the male and female plants in order to pollinate and achieve a high fruit set. As this did not happen, both the size of the crop and the size of the fruit were smaller than normal. This year's crop averaged the second smallest sized fruit, (at 39

U.S. Kiwifruit Exports
in Metric Tons
October to September Marketing Year



with plenty of 42's) in the last ten years. U.S. producers typically ship small sized fruit to Canada, medium sized fruit to domestic markets, and large sized fruit to Asian markets.

Canada, and Korea are major export markets

Total U.S. exports of kiwifruit during 1995/96 reached 5,315 tons, a decrease of about 44 percent from the previous year. The value of exports in 1995/96 was approximately $7.4 million, well below the previous season's level of $13 million. Among the major markets for U.S. kiwifruit are Canada and Korea, which collectively accounted for slightly more than 73 percent of total U.S. exports in 1995/96. U.S. exports to Taiwan declined 63 percent to 509 tons. In Taiwan U.S. kiwifruit competes against lower priced French kiwifruit which continues to be valued around $2 per tray below U.S. kiwifruit.

The Korean market is the key success story for the United States. Exports which had grown almost 10 fold over the past five years, doubled from the 1993/94 level to total 2,659 tons valued at $4.3 million in 1994/95. Last year U.S. shipments declined to 1,572 tons due to a sizable quantity of competitively priced domestic fruit. The California Kiwifruit Commission has used MAP funds to increase consumer advertising, distribute point of sale materials, and maintain public relations.

The Canadian market for U.S. kiwifruit shows signs of recovery

Exports to Canada dropped 42 percent in 1995/96 to 2,339 tons. Exports hit $2.9 million in 1995/96, down $1.9 million from the previous year. The California Kiwifruit Commission (CKC) has been working in Canada to overcome competition from Italian, Greek, and French kiwifruit imports. Last year, promotional activities included consumer promotions, trade shows and trade related activities. Nevertheless, last year the Commission faced one of its toughest battles in Canada. Since 1989, lower priced Italian, Greek and French fruit has flooded California's traditional markets in eastern and central Canada. And now, Chilean fruit is proving tough competition in the western markets. In the last two years U.S. shippers had a one and one half month shipping window to the eastern and central Canadian markets. This year however, U.S. exports to Canada declined in part because of the total collapse of the eastern Canadian market but also

as a result of the lower U.S. crop.

The United States is a net importer of kiwifruit

Imports usually begin in April and end in October when the U.S. crop is harvested. However, improved cold storage technology in major supplying countries has greatly extended the shipping season. This has caused concern in producing countries, as there is some possibility for pressuring prices downward when old-crop imports compete with new-crop domestic fruit. Chile has emerged as the leading supplier of kiwifruit to the U.S. market since the anti-dumping action against New Zealand was implemented in 1992. The following table shows the development of U.S. imports over the past five years. Italy, historically the world's largest producer and exporter, has established a small but expanding market in the United States. Italy's kiwifruit competes directly with U.S. domestic production, as imports begin arriving in November.

United States Kiwifruit Imports Resume Growth (Oct/Sep Year; Metric Tons)

Supplier	1991/92	1992/93	1993/94	1994/95	1995/96
Chile	12,311	19,444	24,847	33,581	31,347
N.Z.	7,801	4,672	3,542	2,617	3,957
Italy	59	675	1,285	1,235	1,858
Others 1/	0	0	41	875	139
TOTAL	**20,171**	**24,791**	**29,714**	**36,558**	**37,301**

Source: U.S. Bureau of Census data. Totals may not add due to rounding.
1/ Others includes small quantities from Canada.

According to U.S. Census data, the average value of imported Italian kiwifruit was $0.81 per kilogram during the 1995/96 season. In contrast, the average import value of New Zealand kiwifruit was $1.10 per kilogram and the average for Chilean fruit was $0.58 per kilogram.

Dumping margin on New Zealand kiwifruit reduced to 3.5 percent

The U.S. Commerce Department's determination of injury to the U.S. domestic kiwifruit industry from imports of New Zealand kiwifruit led to the imposition of a 98.6 percent anti-dumping duty in May 1992. However, since that date the margin has been reduced several times and is now set at 3.5 percent.

The U.S. Customs Service requires a cash deposit or bond equal to the dumping margin on all imports of kiwifruit from New Zealand.

SOUTHERN HEMISPHERE COUNTRIES

The Southern Hemisphere kiwifruit industry is centered in New Zealand and Chile. Australia, by comparison, is a very small kiwifruit producer. Collectively, these suppliers account for about 422,400 tons or 43 percent of world production. Production in the Southern hemisphere increased 1.5 percent while the area planted dropped 5 percent.

NEW ZEALAND

New Zealand continues to be the dominant supplier in the Southern Hemisphere

Kiwifruit production for 1996/97 is forecast to increase one percent to 260,000 tons. This crop is among the largest on record and is due in part to experiencing the best growing season in the last four years. The improved crop is also the result of more intensive management focusing on pollination, thinning, and canopy development. The profile of the crop is described as having larger fruit and improved quality.

This crop was produced on 10,211 hectares compared to 16,000 hectares bearing fruit in 1989. The overall area planted to kiwifruit is expected to remain stable for the next few years.

The Kiwifruit Marketing Board's policies continue to address expanding world production and declining prices

With world production increasing and prices declining the Kiwifruit Marketing Board has sought to improve quality and reduce production. The Kiwifruit Marketing Board (KMB) has employed two strategies designed to limit the volume of fruit marketed: 1) the grower-financed vine pull scheme; and, 2) crop management policy. The

KMB's crop management policy emphasizes production (packed volume) targets that are based on demand from export markets. Packhouses are responsible for determining which grower's fruit not to pick, or which fruit to pick and then store in field bins. The KMB then pays these selected growers the net amount (after picking and packaging costs) it pays to other growers.

N.Z. Marketing Board Plans Year Round Marketing

The Board is considering the idea of marketing kiwifruit throughout the year under the "Zespri" label. The idea is to control sales channels and run 12 month promotional and merchandising programs. This concept however is controversial because to do it would require sourcing kiwifruit from other countries outside the 7 month New Zealand season. Necessarily the "Zespri" brand could not have country of origin designation. Nevertheless the Board believes that this plan would net New Zealand growers greater returns.

KMB returns to growers increase

Strong exports in 1996 resulted in increased returns to growers.

New Zealand Kiwifruit Prices
($NZ/tray = $NZ/3.6 kg)

	1993	1994	1995	1996	1997
NZ$/tray farm gate	4.18	4.79	4.01	4.26	4.30
NZ$/tray KMB receipts	5.32	4.91	4.01	4.26	4.30

Source: FAS/Wellington and New Zealand KMB data
Note: 1997 data are preliminary. Data based on trays submitted, not trays sold.

Exports Continue to Grow

Historically, New Zealand is the second largest exporter of kiwifruit after Italy. Last year however, New Zealand's exports exceeded Italy's by 11,000 tons and this year they may be equal to Italy's exports.

Since 1989 the KMB has exercised control over export sales to all markets except Australia, which usually takes Grade II kiwifruit. Export trade is dominated by shipments to EU countries, with smaller amounts going to Japan, Canada and Taiwan. Collectively, the four largest markets account for about 85 percent of total exports. Exports in 1996/97 are forecast at 230,000 tons, up about one percent from last year's record of 227,000 tons.

N.Z Kiwifruit Exports
Calendar Years, (1,000) tons

Supplier	1994	1995	1996 (Jan-Nov)
EU	102	100	114
Japan	39	29	43
Australia	12	13	17
Canada	4	9	12
Taiwan	4	6	9
Korea	2	3	5
Total	178	174	217

New Zealand holds over thirty percent of the international kiwifruit market. Exports to Asian markets started strongly despite competition from Chilean fruit and disruptions from Class II fruit reexported from Australia at lower prices than Class I fruit.

CHILE

Production continues to increase

Kiwifruit production in Chile in 1995/96 reached a record 153,000 tons up more than 6 percent from 1994/95. Production for 1996/97 is forecast at a record of 157,000 tons, up 3 percent. Planted area is expected to stabilize at the current level of 8,400 hectares and production should stabilize at about 157,000 tons. This is a result of general decline in world prices and a consequent negative return experienced by marginal producers over the last 3 years.

About 1,400 hectares of marginal vines were pulled up last year. But, in spite of this, the crop increased due to excellent growing conditions in new areas. Consequently yields have increased from 14.5 tons/hectare in 1995 to nearly 16 tons in 1996 as the new vineyards begin to reach full-bearing maturity.

Chile's exports continue to increase

Chile is primarily a kiwifruit exporter, with about 80 percent of total commercial production entering export channels. Shipments in 1996/97 are forecast at 122,000 tons, an increase of 3 percent.

Chile's major markets are the EU, the United States, Argentina and Brazil. Traditionally, Chile's export efforts have focused on the EU, although demand is now somewhat diminished as domestic EU production continues to flourish. However, shipments to the United States have expanded rapidly, partly in response to the competitive advantage provided Chile by U.S. anti-dumping duties assessed against New Zealand. Indeed, the United States is now the single largest destination for Chilean kiwifruit. Chile's export season runs from the last week in March through September. According to Chilean data, shipments to the U.S. reached 33,527 tons in 1996 compared to 20,642 tons in 1993.

AUSTRALIA

Australian kiwifruit production in 1995/96 reached 6,000 tons, up 33 percent from the previous year's drought-reduced crop. This season's crop is forecast at 5,400 tons. The decline from last year's level is due to cool weather during the end of December which has affected the size of the fruit.

Production of kiwifruit expanded rapidly in Australia in the 1980's, from 500 tons in 1982/83 to 9,500 tons in 1987/88. However, this expansion led to a serious oversupply situation and plummeting prices. Several large operations pulled vines and ceased production in 1989, resulting in a 46-percent decline in planted area. Since 1988/89, planted area declined from 1,128 hectares to about 450 hectares.

Production, however, increased due to higher yields from maturing vines. Very few new plantings have taken place in the last few years, and now the bearing area accounts for 92 percent of the total area planted. Australian kiwifruit production is concentrated in the states of Victoria, New South Wales, and Queensland. Kiwifruit are harvested from March through May.

Australian consumers demand for high quality fruit keeps imports strong

Australia imports more than three times as much kiwifruit as it produces. Domestic consumption is slowly increasing and has reached 23,000 tons. Imports are running around 18,000 tons. Imports will continue to be strong as consumers have linked fruit size to quality. This means that undersized Australian fruit which reflects unfavorable soil and growing conditions does not compare well with the imported product. New Zealand continues to dominate the imported kiwifruit market.

Australia exports small quantities of kiwifruit to regional markets

Australia exports small amounts of kiwifruit, with 1,000 tons forecast in 1996/97. While Australia has limited early season advantage over New Zealand, prospects for kiwifruit exports are dampened by strong competition from countries such as Chile and the EU producer countries. A lack of direct shipping routes to potential Southeast Asian markets (e.g., Singapore) adds costs and hampers development of regional export markets. Thus, Australia is likely to remain a low-volume exporter.

For further information on supply, distribution, and trade, contact Robert Knapp, 202-720-4620. For information on production, contact Kelly Kirby Strzelecki at 202-720-6791.

KIWIFRUIT PRODUCTION AND TRADE IN SELECTED COUNTRIES
Marketing Years 1993/94-1996/97

COUNTRY	YEAR	PLANTED AREA	PRODUCTION	EXPORTS	IMPORTS
NORTHERN HEMISPHERE 1/					
Italy	1993/94	20,000	310,000	214,000	22,400
	1994/95	19,500	280,000	202,000	23,000
	1995/96	19,500	290,000	216,000	21,000
	1996/97	19,500	330,000	230,000	20,000
France	1993/94	5,180	71,700	24,759	25,214
	1994/95	4,800	78,000	23,083	27,119
	1995/96	4,630	77,500	25,746	25,000
	1996/97	4,500	77,000	23,000	28,000
Greece	1993/94	3,990	39,422	24,214	784
	1994/95	4,000	44,970	20,404	1,145
	1995/96	4,000	40,650	20,100	1,000
	1996/97	4,000	50,000	22,000	1,000
Spain	1993/94	891	9,300	1,880	47,658
	1994/95	954	11,230	1,650	44,460
	1995/96	783	8,332	2,900	55,000
	1996/97	760	13,000	3,000	50,000
Portugal	1993/94	1,059	10,098	528	11,765
	1994/95	1,105	9,191	150	8,719
	1995/96	1,087	8,806	284	9,070
	1996/97	1,050	8,500	250	9,100
Japan	1993/94	4,720	52,100	0	45,282
	1994/95	4,440	52,900	0	47,779
	1995/96	4,150	48,800	0	43,179
	1996/97	3,880	42,900	0	48,000
Korea	1993/94	1,131	8,500	0	3,588
	1994/95	1,380	8,741	0	5,164
	1995/96	1,470	12,184	0	6,291
	1996/97	1,500	13,000	0	7,500

KIWIFRUIT PRODUCTION AND TRADE IN SELECTED COUNTRIES, cont.
Marketing Years 1993/94-1996/97

COUNTRY	YEAR	PLANTED AREA	PRODUCTION	EXPORTS	IMPORTS
United States	1993/94	2,914	44,600	8,749	29,334
	1994/95	2,792	35,743	9,505	36,558
	1995/96	2,752	34,473	5,315	37,301
	1996/97	2,752	27,669	4,500	40,915
Subtotal Northern Hemisphere					
	1993/94	39,775	547,720	274,130	186,025
	1994/95	38,917	520,775	256,792	193,944
	1995/96	38,372	520,745	268,345	197,841
	1996/97	37,565	562,069	282,750	201,431
SOUTHERN HEMISPHERE 2/					
New Zealand	1993/94	13,268	221,000	178,000	0
	1994/95	10,477	227,000	174,000	0
	1995/96	10,481	257,000	227,000	0
	1996/97	10,465	260,000	230,000	0
Chile	1993/94	11,500	115,500	85,000	0
	1994/95	10,040	144,000	111,000	0
	1995/96	9,545	153,000	119,000	0
	1996/97	8,511	157,000	122,000	0
Australia	1993/94	451	5,500	1,084	12,022
	1994/95	450	4,500	800	13,493
	1995/96	450	6,000	1,000	18,150
	1996/97	450	5,400	1,000	18,000
Subtotal Southern Hemisphere					
	1993/94	25,219	342,000	264,084	12,022
	1994/95	20,967	375,500	285,800	13,400
	1995/96	20,476	416,000	347,000	18,150
	1996/97	19,426	422,400	353,000	18,000

KIWIFRUIT PRODUCTION AND TRADE IN SELECTED COUNTRIES, cont.
Marketing Years 1993/94-1996/97

COUNTRY	YEAR	PLANTED AREA	PRODUCTION	EXPORTS	IMPORTS
TOTAL	1993/94	64,994	963,600	538,214	198,047
	1994/95	59,938	896,275	542,592	207,344
	1995/96	58,848	936,745	615,345	215,991
	1996/97	56,991	984,469	635,750	219,431

Note: Production data for Northern Hemisphere countries are estimates; for Southern Hemisphere countries, forecasts.
1/ For Northern Hemisphere countries, data refer to crops harvested in the first half of the split-year(mostly in October-November) and marketed in the second half of the split year (December-May).
2/ For Southern Hemisphere countries, data refer to crops harvested and marketed in the second half of the split-year.
Source: USDA/FAS attache reports; USDA, National Agricultural Statistics Service; and, U.S. Department of Commerce, Bureau of Census.

Processed Tomato Products Situation and Outlook In Selected Countries

Canned tomato and tomato paste production in selected countries in 1996/97 reached record levels, totaling 2.1 and 1.4 million tons, up 25 and 5 percent from the previous season, respectively. The increase in canned and paste production is due mainly to the larger supply of Italian tomatoes being delivered to processors--triggered by increased planted area, favorable weather and favorable market prices in marketing year 1995/96. Tomato paste production in Spain and Portugal also increased significantly during the same period. EU processors of tomato paste accounted for almost all of the increase in tomato paste production in selected countries in 1996/97. With the exception of Chile, tomato paste production in 1996/97 declined in Turkey, Mexico, Brazil and Greece. Exports of canned tomatoes in 1996/97 are forecast at 863,000 tons, up about 10 percent from last season, due mostly to an expected sharp rise in production in Italy. Although tomato paste exports in 1996/97 are forecast to be down slightly, exports from 5 of the 9 selected countries are forecast to increase.

Summary

The revised 1996 production estimate for processing tomatoes in 11 major producing countries is 21.96 million metric tons, down slightly from an earlier estimate of 22.1 million tons, but up about 3 percent from the previous year. This upturn mainly reflects increases of 12, 20 and 38 percent for processing production in Chile, Italy and Spain, respectively. These increases were partially offset by modest to sizable declines in Brazil, Turkey, Israel, Mexico and Greece.

Production of tomato paste in selected countries, not including the United States, in marketing year 1996/97 is estimated at 1.4 million metric tons, up 5 percent from 1995/96. The EU countries account for 65 percent of total production.

Exports of tomato paste from selected countries in 1996/97 are forecast at 946,000 tons, down about 1 percent from the previous season. Italy, Spain and Turkey are expected to account for most of the increase. In addition, the United States is expected to export about 110,000 tons.

End of season tomato paste stocks in selected countries in 1996/97 are forecast to rise 33 percent from 1995/96, in response to higher production and stock adjustments in Italy and Greece. Moreover, a sizable adjustment of year end stocks was made for Brazil in 1995/96 to accommodate higher production and imports.

Canned tomato production in 1996/97 in 6 major producing countries, not including the United States, is estimated at 2.1 million tons, up 25 percent from 1995/96 and up 13 percent from 1994/95. This increase in production mainly reflects a larger supply of fresh tomatoes sent to processors by Italian producers. Italy accounts for 85 percent of selected country canned tomato output. There are no available statistics for canned production in the United States, but

total production is believed to be the largest in the world.

Exports of canned tomatoes in 1996/97 are forecast at 863,000 tons, up 10 percent from 1995/96.

Italy is expected to account for most of the increase.

Canned tomato carryover stocks for selected countries are forecast to rebound to 199,000 tons after 3 consecutive years of decline.

Processing Tomato Production in Selected Countries (1,000 Metric Tons)

Country	1993	1994	1995	1996	1997
North America					
United States	8,778	10,471	10,230	10,350	NA
Mexico	340	350	275	140	200
Total	**9,118**	**10,821**	**10,505**	**10,490**	**NA**
South America					
Brazil	670	878	930	680	1,000
Chile	611	745	902	1,000	886
Total	**1,281**	**1,623**	**1,832**	**1,680**	**1,886**
Western Mediterranean					
Italy	3,500	3,500	3,450	4,150	NA
Greece	1,056 1/	1,145 2/	1,200	1,150	NA
Spain	894	1,211	907	1,257	NA
Portugal	501	865	831	905	NA
France	238	277	280	290	NA
Total	**6,189**	**6,998**	**6,668**	**7,752**	**NA**
Eastern Mediterranean					
Turkey	1,050	1,225	2,050	1,800	NA
Israel	205	254	315	234	NA
Total	**1,255**	**1,479**	**2,365**	**2,034**	**NA**
Total Mediterranean	**7,444**	**8,477**	**9,033**	**9,786**	**NA**
Grand Total	**17,843**	**20,921**	**21,370**	**21,963**	**NA**

1/ Includes approximately 30,000 tons diverted to the fresh market.
2/ Includes approximately 20,000 tons diverted to the fresh market.

Source: Production Estimates and Crop Assessment Division, FAS, USDA.

United States

Processing tomato output down slightly

Production of tomatoes for processing in the United States in 1996 has been revised upward to 10.35 million tons from 10.28 million tons forecast earlier, and up 1 percent from 1995. The upturn was primarily due to higher yields in California, Michigan, Ohio, Pennsylvania, Indiana and Colorado. Other smaller producing states registered increases as well. California accounted for 92 percent of the United States processing tomato acreage in 1996.

The United States is the world's largest producer of processed tomato products, with tomato concentrates (especially tomato paste, sauces and catsup) accounting for the majority of the products. Statistics for U.S. tomato paste production are not available.

Wholesale tomato prices decline

According to the California League of Food Processors, December 1 stocks of processed tomatoes (fresh equivalent) were up 9 percent from the previous year. Because of burdensome supplies, wholesale prices for tomato paste (55 gallon drums) in the first quarter of 1997 weakened to 30 cents per pound from 36 cents per pound in 1996.

Strong domestic and export demand continues to drive U.S. tomato market

Strong domestic and export demand for processed tomato products continues to drive the tomato market. Most of the rising demand since the 1980's is due to increased food service use of tomato products in items such as pizza, pasta and salsa.

U.S. exports of canned tomatoes, tomato paste and sauce at a record pace

U.S. exports of tomato products are currently at a record pace for the first 6 months of 1996/97. During this period, U.S. exports of canned tomatoes totaled 21,000 tons (up 21 percent), tomato paste 61,000 tons (up 31 percent), and tomato sauce 38,000 tons (up 11 percent).

U.S. exports of tomato products in marketing year (July-June) 1995/96, were a record $198 million, up slightly from a year earlier. Canada took the largest share of U.S. tomato products, accounting for about 51 percent of the total value. Other important export markets included Japan, Mexico, Korea, Hong Kong, Taiwan, Italy, Netherlands and the Philippines.

Mexico

Mexico's processing production down

Production of processing tomatoes in Mexico in 1996 has been reduced to 140,000 tons from 174,000 tons forecast earlier. This estimate is down 49 percent from 1995, due to decreased irrigation water availability. Additionally, about 2,200 hectares of tomatoes planted for processing were harvested for fresh consumption, driven by the attractive tomato export market in the United States. Early-season assessment of the 1997 crop, which will be harvested this spring, point to an outturn of 200,000 tons, up 43 percent from 1996, but substantially below an earlier forecast of 245,000 tons. The increase in production in 1997 is based on an expected increase in harvested area.

Tomato paste production down

The bulk of Mexico's processed tomato production is devoted to tomato paste. Tomato paste production in MY 1997/98 (March to February) is forecast to partially rebound to about 30,000 tons, up 43 percent from a lower MY 1996/97 level of 21,000 tons, because of a higher demand for fresh tomatoes for the export market. Prior to last season, Mexico's tomato paste production generally ranged from about 40,000 to 60,000 tons per year.

Seven tomato paste processing plants operate in Mexico. Most are located in the state of Sinaloa, and operate from March to June. These plants are controlled by both Mexican and multi-national firms who produce paste under their own labels and for use in other products such as catsup, sauce, hot sauce, sardines, and other paste products.

The total processing capacity for paste production in Sinaloa is approximately 6,350 tons per day. Most of the tomatoes for processing are contracted by the processors directly with local growers. If additional produce is needed, tomatoes are purchased on the cash market. Tomato paste is made at different concentrations depending on the use: 29, 31, 36 and 44 degrees brix.

Domestic consumption remains unchanged

Domestic consumption of tomato paste in Mexico in MY 1997/98 is forecast at 10,000 tons, unchanged from 1996/97. Consumption of tomato paste in Mexico is estimated as the residual after subtracting exports and ending stocks from supply, then adding imports as appropriate. Although the domestic market is not very large, it acts as buffer for oversupplies of canned tomato paste.

Brazil

Tomatoes for processing down significantly

Production of tomatoes for processing in 1996 has been revised downward to 680,000 tons from an earlier forecast of 1.1 million tons, down 27 percent from 1995, due to higher prices received for fresh market tomatoes, disease problems in some regions which reduced yields, and farmers switching to more profitable crops, such as bananas, guavas, grapes, etc.

Tomatoes are produced in all states of Brazil, mainly for fresh consumption. However, the three most important regions where tomatoes for processing are grown are Sao Paulo, the Sao Francisco River Valley in the Northeast, and the Cerrado regions of the states of Goias and Minas Gerais. In 1996, these regions accounted for 71 percent of all tomato production in Brazil, and virtually all of the tomatoes used for processing.

Planting of tomatoes in Brazil begins in February and ends around June, while harvesting starts in June and runs through October and November.

In Brazil, about 70 to 75 percent of domestic production goes into tomato paste and extract. Production of tomato paste in 1996 is estimated at 73,000 tons, down 27 percent from the 1995 record. Most of the paste is used in further processing into consumer-ready sauces and other such products. Production in 1997 is forecast at 107,000 tons.

Production of canned tomatoes in Brazil in 1996 is estimated at 800 tons, down 20 percent from 1995.

Average farmgate price paid to growers in 1997 unchanged from 1996

In Brazil, indications are that prices for the 1997 crop will be in the general range of those in 1996--US$61.00 per ton in Bahia and Pernambuco and US$71.000 per ton in Sao Paulo. The average farmgate price paid to producers in Goias and Minas Gerais is estimated to be around US$76 per ton in 1997. Under the typical contract, companies provide seeds and other inputs as well as extension and technical assistance to growers. Many growers have difficulties obtaining production loans if they do not already have a contract.

Consumption of tomato products on the rise

There is potential for large increases in Brazilian consumption of processed tomato products, especially consumer-ready "ethnic" sauces. Consumption patterns are changing in Brazil. People have less time to go shopping for fresh produce, more women are entering the work force, more people are working "9-to-5" type jobs, more people are moving to the cities, and fewer people have time to go home for lunch. In this environment, the demand for tomato products in fast food (pizzas, hot dogs, hamburgers) and consumer-ready products is becoming more and more important.

Trade situation

Tomato paste accounts for most of Brazil's imports of tomato products (imported paste is 28-32 degrees brix) and is further processed in Brazil into consumer-ready sauces and other similar products. The average FOB prices for imported paste in 1994 and 1995 was US$1,010 per metric ton and US$860 per ton, respectively. Approximately, 80 percent of Brazil's tomato product imports come from Chile. The European Union and Argentina account for most of the remaining total.

Chile

Processed tomato production up marginally

Production of tomatoes for processing in Chile in 1996 is estimated at 1.0 million tons, up 11 percent from 1995. Harvested area increased 10 percent due to favorable export prices relative to other crops and planting of improved, higher yielding varieties. Production of processing tomatoes in 1997 is forecast at 886,000 tons, down 11 percent from 1996 due to severe drought in major producing regions of the country (La Serena and Talca). Total planted area is forecast to decline 11 percent in 1997. Industry sources forecast that a lower quality product may result since it is undetermined how much water will be available for the planted crops.

Tomatoes for processing are planted from mid-September through early December of each year and harvested from around January 10 through April 15. Frosts are a limiting factor for the planting season.

Chile's processing industry

Chile's output of processing tomatoes has expanded rapidly over the last decade, principally as a result of strong international demand for tomato paste, the introduction of new varieties for industrial purposes, and diminished economic returns for alternative crops.

Chile's processing tomato industry produces mainly tomato paste and canned tomatoes (whole-peeled, diced-peeled and crushed).

The tomato industry in Chile produces mostly 30 to 32 degree brix paste. However, small amounts of product are produced at 28 to 30 brix for the Japanese market.

The current annual installed capacity for processing tomatoes in Chile is about 120,000 to 140,000 tons. There are eight major tomato processing plants in Chile. Only four of the eight major tomato processing plants produce canned tomatoes.

Tomato paste production up in 1996, but expected to be down in 1997

Tomato paste is produced mainly for the export market. Tomato paste production in 1996 in Chile has been reduced from 128,000 to 120,000 tons, but still up 2 percent from 1995, due mostly to an increase in harvested area. The tomato paste industry in Chile has been operating near its production capacity for the last few years as a result of consistent growth in foreign demand. However, a much smaller rate of expansion is expected in coming years due to increased competition from countries with a comparative advantage in tomato production, such as Peru. Iansa, Chile's largest tomato processor, has invested heavily in a processing plant in Peru, and further expansion is proposed. Tomato production in Peru has many advantages over Chile, including an extended production season of 9 months, compared to only 3 months in Chile. Also, Peruvian tomato products are exported duty free into the United States (Andean country preference) and most European countries.

Tomato paste exports up

In 1996, tomato paste exports totaled 110,000 tons, accounting for approximately 93 percent of the total paste production. Brazil and Japan accounted for 42 and 16 percent of exports, respectively. Other principal markets include Argentina, Dominican Republic, Guatemala, Honduras, Venezuela, Colombia and Mexico.

Mediterranean Area

European Union

The 1996 harvest of tomatoes for processing in the major producing countries of the European Union (EU) is estimated at 7.75 million tons, up 16 percent from 1995 because of significantly larger crops in Italy and Spain. The EU's 1996 minimum grower prices for processing tomatoes, in ECU terms, were unchanged from 1995 at 9.549 ECU per 100 kilograms for tomatoes to be processed into paste, juice, or non-whole products; 15.807 ECU per 100 kilograms for whole San Marzano variety tomatoes; and 12.161 for whole Roma variety tomatoes and tomatoes for producing flakes.

In October 1996, the EU reformed the Common Organization of the Market (COM) for Fruits and Vegetables. The new policy provides greater financing

and discretionary authority to producer groups in individual EU member states. All contracts currently entered into with individual processors will have to be signed by producer groups beginning in the year 2002. For tomatoes, the new policy modified the production quota for processing tomatoes for 1997 and 1998. The total EU production quota will rise from 6.651 million tons in 1996 to 6.836 million tons in 1997 and 1998, expanding the quota for tomatoes for paste production and reducing the quota for whole tomatoes for canning. After the 1998/99 year, production quotas will vary and will be recalculated according to historical references of the 3 previous years. The total EU quota will remain the same, while each EU member state quota will vary according to whether or not they fulfilled their quota during the reference years. For example, if a EU Member State under-utilized its quota during a given year, the quota would be reduced for the following year. Minimum grower prices for 1997 have not been set under the reformed COM.

Italy

Processed tomato production up significantly

Tomatoes for processing production in Italy in 1996 has been revised upward to 4.15 millions tons from an earlier forecast of 3.55 million tons, due to larger than expected planted and harvested areas, good rainfall during the growing season, and favorable prices received in 1995/96 marketing year.

Area planted to tomatoes for processing in 1996 is currently forecast at 90,000 hectares, up 8 percent from 83,000 hectares estimated earlier.

Approximately 50 percent of tomatoes used for processing production in Italy consist of whole peeled canned tomatoes and grown in the southern part of the country. The San Marzano and similar type varieties are used for this production are harvested exclusively by hand. The remaining tomato processing production areas are located between northern and southern Italy, and consist mostly of the round type varieties that are harvested mechanically.

The bulk of Italy's processing season is concentrated in August and September, but in some years it continues to October.

The EU increased Italy's tomato production quota to 3.47 million tons beginning in 1997 from 3.3 million tons.

Italy's canned tomato product exports to the United States are expected to increase

The United States recently eliminated the 100 percent punitive duty on Italian canned tomato imports into the United States. This duty was originally imposed in response to the EU/U.S. beef hormone dispute. Without the additional duty, Italian tomato product exports to the United States are expected to increase significantly during the 1996/97 marketing year.

Tomato paste and canned tomato production up significantly

Tomato paste production in Italy in 1996 is estimated at 396,000 tons, up 37 percent from an earlier forecast and 32 percent above the previous year. Canned tomato production for the same period has also been revised upward to 1.77 million tons from 1.5 million forecast earlier, and up 30 percent from 1995. Increased production for both paste and canned tomatoes was attributed mainly to increased area harvested, favorable weather conditions during the growing season, and favorable prices during the 1995/96 marketing year.

Tomato sauce production

The trend for tomato sauce production in Italy continues to grow, due to increased consumer preference for convenience foods. In 1996, tomato sauce production is estimated at 43,000 tons, up 2 percent from 1995.

Canned tomatoes and paste exports remain strong

The 1996/97 Italian canned tomato export forecast has been increased to 750,000 tons from 630,000 tons forecast earlier, and up 10 percent from 1995/96. The tomato paste export forecast for 1996/97 has also been revised upward to 300,000 tons from 270,000 tons forecast earlier, and up 19 percent from 1995/96.

Portugal

Production of tomatoes for processing at a record

Production of tomatoes for processing in Portugal in 1996 is estimated at a record 905,000 tons, up 7 percent from an earlier forecast and up 9 percent from 1995. Tomato paste, which accounts for the bulk of Portugal's processed production, is estimated at 162,000 tons, up 10 percent from an earlier forecast and up 11 percent from the previous year. Production of other tomato products consists mostly of diced tomatoes (peeled or unpeeled), and crushed tomatoes.

Despite early-season concerns about the heavy rains and cold weather that delayed planting of the 1996 crop, yields are considered very good. Crop quality and coloration are reported above average. However, industrial yields are reported to be at around 3 percent below "normal" yields, due to lower average solid content in the tomato crop used for processing.

The 1996 crop year continued to be marked by considerable changes at the farm level. The traditional small "seareiros" (farmers on 5 to 10 hectares) continue to be displaced by larger production units. An estimated 3,000 hectares of all tomato area now consist of larger-scale farms with direct-seeding technologies, using drip irrigation systems and mechanical harvesting. The proportion of large farms is expected to increase in the future because of the need to attain economies of scale.

Tomato paste exports steady

Exports in 1996 are estimated at 90,000 tons, down 29 percent from an earlier forecast. The primary export market is the EU. Sales of tomato paste to the Middle East and Japan continue to increase.

Greece

Greek tomatoes for processing down slightly

Production of processing tomatoes in Greece in 1996 is estimated at 1.15 million tons, down 4 percent from both an earlier forecast and the 1995 estimate. Tomato paste production in 1996, which accounts for the bulk of Greek processed tomatoes, has been revised to 182,000 tons (converted to 28-30 percent TSS basis) from 195,000 tons forecast earlier. Other processed tomato products include juice.
Tomato juice and "passata" production figures are included in total paste production since the National Statistical Service reports foreign trade data under the heading of "tomato pastes" in three groups of products a) below 12 percent TSS concentration, b) between 12-30 percent TSS, and c) over 30 percent TSS. In 1996, tomato processing started in Peloponnesos around mid-July and ended about mid-September, while in Macedonia, processing starts on August 1 and ends about the first week of October.

The EU minimum grower and processing aids to canners for canned whole tomatoes, peeled and unpeeled, as well as crushed tomatoes for the 1996 campaign on a net weight basis as set by EU Regulation Number 1398/96, July 18, 1996 and Ministry of Agriculture Circular Number 330592 of August 6, 1996 were as follows:

	Grower prices	**Processing Aid**
	(ECU per 100 kilograms net)	
Wholes Tomatoes in Juice/Water		
a) San Marzano Type	15.807	10.648 1/
b) Roma Type & Similar	12.161	7.509 1/ and 6.383 2/
Crushed Tomatoes	9.549	5.256

Notes: 1/ When packed in juice. 2/ When packed in water. Note: US$1.00= 240.23 drachmas (Jan-Nov 1996).

These prices and processing subsidies in ECU's apply to all EU countries.

Spain

Processed tomato production up sharply

Production of tomatoes for processing in Spain in 1996 is estimated at 1.3 million tons, up 28 percent from an earlier forecast and up 39 percent from 1995. Favorable weather, including abundant rainfall, and higher crop yields were the major factors contributing

to the larger production in 1996, despite a 10 percent decline in harvested area.

The severe drought that affected most parts of Spain during the past 5 years is over. The rains that began during the months of November and December of 1995 and continued throughout most of 1996 ended what was a difficult period for some of Spain's tomato producers. About 80 percent of Spain's total tomato crop is irrigated, with some 8,000 hectares grown undercover. The tomato crop for tomato paste processing is grown mainly in Estremadura, while the crop for whole peeled processing is grown in the Ebro River basin, e.g., Navarra, La Rioja and Aragon, Toledo, and Murcia.

Consumption up

According to the U.S. Agricultural Counselor in Madrid, the consumption of tomato products in Spain continues to grow at a steady rate of about 4 to 5 percent each year. The main source of growth is coming from increasing demand for tomato sauces. This recent growth trend is encouraging processors to enlarge their processing capacity.

EU Regulation 1398/96, of July 18, 1996 established a minimum grower price to be paid to Spanish producers during marketing year 1996/97 for processing tomatoes which are the same as those paid to Greek growers shown above. In addition, the minimum price paid to growers for tomato concentrate and juice with a soluble dry weight content of between 4.8 and 5.4 percent is 9.549 ECU's per 100 kilograms; and the minimum price growers paid for tomato flakes with a soluble dry weight content of between 4.8 and 5.4 percent is 12.161 ECU's per 100 kilograms.
Consumption of tomato products in Spain continues at a steady growth rate. This is encouraging processing plants to enlarge their processing capacity.

Trade Situation

Traditionally, exports of canned tomato products from Spain account for about 20-25 percent of total production, while tomato paste exports account for about 50-60 percent of total production. EU countries purchase the bulk of Spain's tomato product exports.

Turkey

Processing production up

Production of tomatoes for processing in Turkey in 1996 has been revised upward to 1.8 million tons from 1.7 million tons forecast earlier, but down 12 percent from 1995 due to large carryover stocks. The upswing in production reflects increased planted area by farmers without contracts in expectation of higher returns from tomatoes as opposed to alternative crops, such as cotton and sugar beets. A significant portion of these tomatoes were utilized by small processors. Although the tomato crop was planted two weeks late due to the cool and wet spring weather, improved weather later in the production season extended harvesting through the end of October.

Tomato paste outturn up

Commercial tomato paste production in 1996 was revised upward to 285,000 tons from 250,000 tons forecast earlier, due also to increased area. However, prior to planting, large processors were relatively cautious in contracting for tomatoes due to large domestic carryover stocks and competition from international producers.

Production capacity for tomato paste has been significantly underutilized over the past several years. However, recently firms have begun to invest in increased capacity in expectation of attractive long-term returns, which are expected to come mainly from exports, rather than domestic demand.

Turkey has an annual tomato paste capacity of 375,000 tons, the second largest in Europe after Italy with a 400,000 ton capacity.

Tomato trade outlook

Turkey's tomato paste industry continues to depend on exports. In marketing year 1996/97 exports are forecast at 185,000 tons, up 6 percent from 1995/96. Turkey is trading a significant amount of low quality tomato paste (18 to 20 percent TSS basis) with the former Soviet Union, especially Ukraine. Prices reportedly are as low as US$400.00 per ton, FOB Istanbul, and as much as 50,000 tons could be exported during 1996/97 marketing year. Most of the

production is expected to come from the smaller processors. Larger processors are concerned that this low quality tomato paste trade will not only be short term, but will not benefit the reputation of the Turkish tomato paste industry.

In addition, Turkish processors expect to benefit from the approval of the United Nation's "food-for-oil" resolution that allows Iraq to sell petroleum for food. Even though tomato paste is not one of the food items listed, sources expect some exports to take place under the "Other Unidentified" category.

Japan continues to be Turkey's leading export destination, because the Japanese prefer the color and taste of Turkish paste and believe that hand picking improves the quality. Several Japanese firms are in partnership with Turkish processors and the trend to greater Japanese investment in the industry is expected to continue. However, exporters note they have begun to face increasing competition from Chinese exports in the Japanese market. The European Union (EU) and Japan are Turkey's largest markets. Turkish tomato paste prices for 1996/97 are reported to about US$740.00 per ton, CIF, which is slightly below last year.

Turkish processors remain optimistic that ongoing agricultural negotiations with the EU will benefit their industry. Currently, the EU is looking to reduce Turkey's duty-free tomato paste export quota from the existing level of 38,400 tons to 32,000 tons, while Turkey is asking to increase its duty-free access.

France

Processing production revised downwards

Production of processing tomatoes in France in 1996 has been revised downwards to 284,000 tons from 290,000 tons forecast earlier, but up 2 percent from 1995. According to the French Federation of Canning Cooperatives, of the total amount of fresh tomatoes delivered to processors in 1996, 215,000 tons was for tomato paste production, 22,000 for canned whole peeled tomatoes, and 47,000 for other tomatoes specialities. Tomato paste production in 1996 was 37,500 tons, up slightly from 1995. In the EU, France ranks third in canned whole peeled tomato production after Italy and Spain, and ranks fifth after Italy, Greece, Portugal and Spain in tomato paste production.

The EU quota for French production of processed tomatoes in 1997 and 1998 has been reduced to 369,608 tons from 392,406 tons in 1996. The majority of the reduction came from the quota for whole peeled tomatoes for canning, declining from 73,628 tons in 1996 to 51,113 tons in 1997, which France has not traditionally utilized. See European Union section for details.

The EU minimum grower price for French fresh tomatoes intended for the production of canned whole peeled tomatoes and canned tomato paste amounted to US$15.69 per 100 kilogram, and US$12.35 per 100 kilogram in 1996, respectively.

Israel

Closing of three processing plants lowers outturn

Production of processing tomatoes in 1996 in Israel is estimated at 234,000 tons, down 26 percent from 1995, due to the closing of three processing plants and the subsequent reduction in planted area. In 1996, area planted for processing tomatoes totaled 2,600 hectares, compared to 3,000 hectares the previous year.

In Israel, processed products include: whole and diced peeled tomatoes, tomato paste and puree, tomato juice, ketchup and pizza sauces. Most Israeli tomato processors produce the whole range of tomato products.

Tomato product consumption in Israel accounts for about 80,000 tons annually in raw terms, with the rest going to exports.

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Canned Tomatoes [1]: Production, Supply, and Distribution in Selected Countries
Metric Tons Net Weight; Including whole peeled, and/or wedged, diced, crushed, and other non-concentrated products; 1994/95 to Forecast 1996/97

Marketing Year [2]	Beginning Stock	Production	Imports	Supply Distribution	Exports	Domestic Consumption	Ending Stock
France							
1994/95	11,304	50,200	88,000	149,504	6,000	123,000	20,504
1995/96	15,118	40,000	84,837	139,955	5,611	125,000	9,344
1996/97	9,344	35,000	88,000	132,344	5,000	120,000	7,344
Greece							
1994/95	615	25,315	15,612	41,542	10,197	28,000	3,345
1995/96	3,345	25,245	14,000	42,590	12,000	28,000	2,590
1996/97	2,590	23,520	15,000	41,110	11,000	29,000	1,110
Italy							
1994/95	134,000	1,456,000	6,000	1,596,000	631,000	840,000	125,000
1995/96	125,000	1,359,000	6,000	1,490,000	683,000	807,000	0
1996/97	0	1,768,000	6,000	1,774,000	750,000	840,000	184,000
Spain							
1994/95	2,000	275,000	100	277,100	60,000	172,100	45,000
1995/96	45,000	209,000	4,000	258,000	55,000	174,000	29,000
1996/97	29,000	225,000	500	254,500	70,000	178,000	6,500
Brazil							
1994/95	0	10,000	334	10,334	1,963	8,371	0
1995/96	0	1,000	8,505	9,505	1,595	7,910	0
1996/97	0	800	9,200	10,000	1,200	8,800	0
Chile							
1994/95	58	25,000	0	25,058	20,689	3,200	1,169
1995/96	1,169	30,350	0	31,519	27,336	3,250	933
1996/97	933	28,740	0	29,673	26,000	3,300	373
Total							
1994/95	**147,977**	**1,841,515**	**110,046**	**2,099,538**	**729,849**	**1,174,671**	**195,018**
1995/96	**189,632**	**1,664,595**	**117,342**	**1,971,569**	**784,542**	**1,145,160**	**41,867**
1996/97	**41,867**	**2,081,060**	**118,700**	**2,241,627**	**863,200**	**1,179,100**	**199,327**

Source: U.S. Agricultural Attache Reports. [1] Includes whole peeled, and/or wedged, diced, crushed, and other non-concentrated products. [2] Marketing years are July-June with the exception of France's which is August-July, and Brazil's which is May-April. Note: For calendar year reference, MY1994/95 would become CY1994.

Tomato Paste: Production, Supply, And Distribution In Selected Countries
Metric Tons Net Weight, 28-30 Percent TSS Basis

Marketing Year [1/]	Beginning Stock	Production	Imports	Supply Distribution	Exports	Domestic Consumption	Ending Stock
France							
1994/95	3,263	36,500	49,223	88,986	2,416	83,302	3,268
1995/96	3,268	37,000	49,001	89,269	3,955	82,000	3,314
1996/97	3,314	37,500	48,000	88,814	3,900	82,800	2,114
Greece							
1994/95	0	197,949	2,879	200,828	174,769	10,000	16,059
1995/96	16,059	198,608	2,500	217,167	200,000	10,000	7,167
1996/97	7,167	181,850	2,500	191,517	150,000	10,000	31,517
Italy							
1994/95	0	290,000	70,000	360,000	240,000	110,000	10,000
1995/96	10,000	300,000	88,000	398,000	253,000	100,000	45,000
1996/97	45,000	396,000	30,000	471,000	300,000	100,000	71,000
Portugal							
1994/95	4,190	154,382	0	158,572	124,656	31,344	2,572
1995/96	2,572	145,585	0	148,157	105,468	41,689	1,000
1996/97	1,000	162,183	0	163,183	90,000	43,183	30,000
Spain							
1994/95	15,000	145,000	1,000	161,000	60,000	58,000	43,000
1995/96	43,000	102,000	5,000	150,000	60,000	60,000	30,000
1996/97	30,000	145,000	500	175,500	75,000	65,000	35,500
Total EU							
1994/95	22,453	823,831	123,102	969,386	601,841	292,646	74,899
1995/96	74,899	783,193	144,501	1,002,593	622,423	293,689	86,481
1996/97	86,481	922,533	81,000	1,090,014	618,900	300,983	170,131
Turkey							
1994/95	18,975	204,000	800	223,775	122,557	87,000	14,218
1995/96	14,218	310,000	0	324,218	175,000	105,000	44,218
1996/97	44,218	285,000	0	329,218	185,000	100,000	44,218
Chile							
1994/95	3,814	92,321	0	96,135	82,536	10,100	3,499
1995/96	3,499	118,460	0	121,959	106,632	11,450	3,877
1996/97	3,877	120,485	0	124,362	110,000	11,650	2,712
Mexico							
1994/95	0	52,500	0	52,500	41,500	11,000	0
1995/96	0	40,000	1,000	41,000	31,000	10,000	0
1996/97	0	21,000	500	21,500	11,500	10,000	0
Brazil							
1994/95	0	56,000	32,000	88,000	18,000	70,000	0
1995/96	0	99,600	50,000	149,600	18,680	100,000	30,920
1996/97	30,920	73,000	26,000	129,920	20,174	108,000	1,746
Grand Total							
1994/95	**45,242**	**1,228,652**	**155,902**	**1,429,796**	**866,434**	**470,746**	**92,616**
1995/96	**92,616**	**1,351,253**	**195,501**	**1,639,370**	**953,735**	**520,139**	**165,496**
1996/97	**165,496**	**1,422,018**	**107,500**	**1,695,014**	**945,574**	**530,633**	**218,807**

Source: U.S. Agricultural Attache Reports. 1/ Marketing years are July-June with the exception of France's which is August-July, Brazil's which is May-April, Mexico's which is March-February, and Turkey's which is September-August. 2/ See text. Note: For calendar year reference, MY 1994/95 becomes CY 1994.

U.S. Exports of Canned Tomatoes, Paste, Ketchup, and Tomato Sauce, MY 1991/92-1996/97 [1/]
(Metric Tons)

Commodity/ Country	1991/92	1992/93	1993/94	1994/95	1995/96	July-Dec. 1996/97
Canned Tomatoes:	16,543	29,154	28,830	30,026	36,251	20,559
Canada	10,553	21,032	20,680	17,342	19,571	11,690
Japan	1,712	2,755	2,703	8,802	11,432	4,497
Korea, Rep.	97	349	321	439	920	1,197
Mexico	846	521	392	388	69	370
Australia	428	510	1,835	600	641	429
Hong Kong	129	230	230	250	230	247
Singapore	288	166	196	260	228	156
Malaysia	169	170	168	194	188	180
Australia		162	1,223	382	464	429
Others		3,259	1,082	1,369	2,509	1,364
Tomato Paste:	59,859	66,811	77,814	89,886	87,641	60,933
Canada	32,427	46,004	43,168	47,971	45,326	30,459
Japan	9,560	3,835	8,247	10,450	12,354	5,442
Korea, Rep.	3,427	4,638	4,800	1,862	5,908	2,664
Italy	0	0	77	6,361	5,255	2,441
Dominican Rep.	110	1,436	1,366	2	3,918	2,894
Haiti	498	48	403	2,219	2,615	2,425
Taiwan	196	218	1,145	2,600	2,444	249
Philippines	2,570	3,517	3,676	4,003	1,470	1,657
Colombia	38	53	1,081	461	1,112	1,084
Australia	0	1,246	6,332	121	721	868
Panama	14	108	1,057	287	678	47
Mexico	7,071	1,792	2,886	2,513	258	2,064
Others	3,948	3,916	3,576	11,036	5,582	8,639
Tomato Sauce:	52,173	60,664	73,735	72,445	71,073	37,882
Canada	34,594	40,721	47,350	46,193	47,644	26,937
Mexico	3,640	6,029	5,871	5,507	2,374	1,999
Japan	6,706	4,871	4,878	5,471	5,594	2,234
United Kingdom	316	977	4,763	4,978	1,866	655
Netherlands	704	720	1,215	1,405	986	689
Korea, Rep.	131	397	1,116	904	1,529	320
Saudi Arabia	1,589	439	893	953	1,017	345
Kuwait	265	675	536	341	940	482
Others	4,228	5,835	7,113	6,693	9,123	4,221
Ketchup:	21,922	23,438	27,296	41,860	40,010	20,382
Canada	1,749	1,412	1,221	5,666	6,545	2,847
Mexico	3,056	2,500	2,581	3,223	3,052	2,146
Japan	5,726	4,849	9,017	10,117	11,629	4,980
Korea, Rep.	265	172	2,443	7,389	1,151	315
Hong Kong	4,730	6,515	4,761	5,062	4,586	2,356
Saudi Arabia	840	1,490	1,419	1,513	1,768	532
Others	5,556	6,500	5,854	8,890	11,279	7,206

[1/] Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census.

U.S. Imports of Canned Tomatoes 1/
(Metric Tons)

Country	1991/92	1992/93	1993/94	1994/95	1995/96
Italy	11,649	15,715	16,961	24,166	23,119
Spain	1,902	1,156	5,816	6,410	2,878
Others	0	54	55	0	376
Total European Union	**13,551**	**16,925**	**22,832**	**30,576**	**26,373**
Argentina	1,527	678	0	0	0
Brazil	237	380	411	68	0
Chile	13,581	16,898	11,541	16,190	12,314
Others	0	19	2	5	5
Total South America	**15,345**	**17,975**	**11,954**	**16,263**	**12,319**
Canada	842	827	1,716	808	4,627
Israel	12,361	7,927	11,810	10,792	19,892
Morocco	101	0	361	4,648	599
Turkey	1,927	2,468	2,020	817	1,182
All Others	**1,127**	**286**	**499**	**802**	**1,622**
Grand Total	**45,254**	**46,408**	**51,192**	**64,706**	**66,614**

1/ Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following (HTS) Harmonized Tariff Schedule commodity codes: 2002900050, 2002100020, 2002100040, 2002100050, and 2002100090.

U.S. Imports of Tomato Sauce 1/
(Metric Tons)

Country	1991/92	1992/93	1993/94	1994/95	1995/96
Italy	613	195	200	489	217
Chile	1,252	1,357	289	0	0
Canada	638	3,200	2,982	3,172	4,679
Dominican Rep.	1,205	1,463	827	2,124	1,522
China, Peoples Rep.	0	0	430	2	0
All Others	**389**	**165**	**369**	**627**	**865**
Grand Total	**4,097**	**6,380**	**5,097**	**6,414**	**7,283**

1/ Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2103204020 and 2103204040.

U.S. Imports of Tomato Paste and Puree [1/]
(Metric Tons)

Country	1991/92	1992/93	1993/94	1994/95	1995/96
Mexico	10,791	20,312	28,428	7,985	8,004
Chile	8,134	7,789	6,576	4,395	4,334
Canada	0	1,439	5,346	9,646	6,242
Italy	791	1,025	1,352	1,385	957
Israel	1,948	776	1,330	2,825	3,675
Spain	132	332	1,308	86	84
All Others	**2,502**	**2,088**	**1,859**	**898**	**338**
Grand Total	**24,298**	**33,761**	**46,199**	**27,220**	**23,634**

[1/] Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2002900010, 2002900030, and 2002900040.

U.S. Imports of Ketchup 1/
(Metric Tons)

Country	1991/92	1992/93	1993/94	1994/95	1995/96
Canada	53	186	397	10,347	18,186
Chile	52	4	0	0	0
All Others	**20**	**40**	**17**	**10**	**10**
Grand Total	**125**	**226**	**414**	**10,357**	**18,196**

1/ Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity code: 2103202000.

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COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
TAIWAN		10,835	12,143	61,758	75,557	101,650	8,206	7,923	43,461	49,765	72,448
MEXICO		2,203	4,557	19,849	20,262	80,802	1,138	2,397	10,374	10,197	41,697
CANADA		6,027	5,491	40,638	44,048	78,790	5,013	4,363	31,108	33,673	62,246
HONG KONG		2,874	3,315	24,766	21,239	49,741	1,866	1,904	15,636	13,327	31,788
INDONESIA		2,245	2,697	22,662	21,301	49,455	1,508	1,892	15,024	15,583	33,534
EU-15		4,289	5,027	17,022	18,281	35,480	2,486	2,706	9,543	10,334	21,366
OTHER		35,944	29,858	111,882	125,983	166,636	21,104	17,493	66,994	73,664	104,109
Subtotal:-----		64,417	63,087	298,578	326,672	562,555	41,320	38,678	192,140	206,542	367,188
FR. PEARS(JUL)	MT										
CANADA		4,242	2,575	29,236	28,553	44,348	2,985	2,321	20,112	22,687	31,557
MEXICO		2,302	2,669	10,946	15,835	28,430	1,266	1,310	5,751	7,906	14,384
BRAZIL		3,996	652	21,686	17,778	21,747	1,859	308	9,485	7,902	9,522
EU-15		2,625	2,308	9,788	5,598	11,582	1,232	1,084	4,093	2,676	5,090
TAIWAN		2,491	437	6,516	3,445	11,438	1,298	223	3,644	2,364	6,655
OTHER		4,125	3,371	15,062	12,652	25,768	2,125	2,298	8,370	8,441	15,361
Subtotal:-----		19,781	12,013	93,233	83,860	143,313	10,765	7,544	51,456	51,978	82,570
APRICOTS(MAY)	MT										
CANADA		54	75	2,632	2,334	2,679	63	93	3,571	3,322	3,632
EU-15		35	0	388	216	431	17	0	754	238	796
MEXICO		0	0	324	182	324	0	0	289	145	289
HONG KONG		0	0	222	0	222	0	0	611	0	611
OTHER		19	29	514	297	596	14	77	716	290	773
Subtotal:-----		108	104	4,079	3,030	4,252	94	170	5,941	3,995	6,102
FR CHERRIES(MAY)	MT										
JAPAN		0	0	17,170	13,124	17,183	0	0	110,553	80,071	110,610
EU-15		1,318	885	7,386	7,366	9,184	1,567	685	11,422	15,596	12,873
CANADA		57	50	3,456	4,792	3,492	109	132	8,712	12,735	8,773
NETHERLANDS		758	174	2,707	2,482	3,233	599	133	2,300	2,468	2,712
BELGIUM-LUXEMBOU		436	500	2,345	1,262	2,826	882	380	2,364	1,145	2,804
TAIWAN		0	0	2,098	3,244	2,120	0	0	6,325	10,971	6,428
OTHER		31	0	1,690	2,449	1,714	61	0	4,288	7,859	4,364
Subtotal:-----		1,405	935	31,800	30,975	33,692	1,738	817	141,300	127,232	143,048
PEACH-NECTRN(MAY)	MT										
CANADA		114	190	39,338	41,178	40,277	181	279	41,169	40,680	42,457
MEXICO		0	0	11,674	8,782	11,693	0	0	5,159	4,498	5,164
TAIWAN		0	0	9,818	16,159	9,818	0	0	11,033	18,132	11,033
OTHER		50	102	4,485	8,455	4,746	41	73	3,815	7,920	3,958
Subtotal:-----		164	293	65,314	74,575	66,534	222	352	61,176	71,229	62,612
PLUM-PRUNES(MAY)	MT										
CANADA		90	69	13,712	21,675	14,364	136	109	19,710	19,276	20,733
TAIWAN		80	0	13,965	21,376	14,000	58	0	15,037	19,377	15,084
HONG KONG		27	0	5,453	12,027	5,459	20	0	6,108	10,838	6,119
OTHER		107	5	4,460	11,108	4,590	82	8	4,804	9,698	4,969
Subtotal:-----		303	74	37,591	66,185	38,413	296	116	45,659	59,188	46,905
FR AVOCADOS(OCT)	MT										
EU-15		179	416	2,345	1,708	5,984	139	339	1,537	1,299	4,918
NETHERLANDS		54	355	1,567	1,336	4,178	31	275	1,047	969	3,271
JAPAN		16	0	96	5	2,784	8	0	96	3	5,866
CANADA		156	191	487	402	1,183	161	196	484	393	1,272
UNITED KINGDOM		71	60	415	222	1,034	31	64	242	191	943
OTHER		0	12	13	60	139	0	23	20	88	286
Subtotal:-----		351	618	2,941	2,174	10,090	309	559	2,136	1,784	12,342
FR KIWIFRUIT(OCT)	MT										
CANADA		142	133	489	879	2,339	188	151	642	924	2,939
KOREA, REPUBLIC		119	262	338	486	1,572	195	383	540	773	2,640
TAIWAN		13	0	46	0	509	14	0	57	0	831
JAPAN		3	0	14	0	338	3	0	11	0	293
OTHER		85	84	102	90	557	95	150	117	185	676
Subtotal:-----		362	478	989	1,454	5,315	495	683	1,367	1,882	7,378
FRESH GRAPES (MAY)	MT										
CANADA		5,420	1,922	100,125	83,387	103,704	6,826	3,763	113,438	104,963	118,691
HONG KONG		2,793	2,083	28,032	36,345	30,319	3,615	3,760	37,786	55,114	40,706
TAIWAN		1,065	592	12,598	16,060	12,897	1,015	538	15,709	20,700	16,002
MEXICO		4,336	2,046	11,121	9,167	12,813	4,189	2,521	10,415	9,178	12,074
OTHER		12,432	5,173	63,058	58,092	67,159	15,097	7,941	85,833	88,586	90,470
Subtotal:-----		26,046	11,817	214,934	203,051	226,892	30,742	18,522	263,180	278,542	277,943
FR STRAWBRIS(JAN)	MT										
CANADA		457	413	37,075	40,277	37,075	1,479	1,327	51,078	52,087	51,078
JAPAN		67	162	6,653	6,227	6,653	99	946	24,166	24,792	24,166
MEXICO		0	0	3,002	2,138	3,002	0	0	2,396	2,097	2,396
EU-15		5	3	2,696	3,167	2,696	22	14	6,343	8,956	6,343
OTHER		56	199	1,093	821	1,093	200	439	3,171	2,155	3,171
Subtotal:-----		584	778	50,518	52,631	50,518	1,800	2,727	87,154	90,086	87,154
FR ORNG INC TMPL(NOV)	MT										
CANADA		16,885	15,538	32,063	32,947	176,012	8,207	7,658	17,118	16,691	88,806
JAPAN		6,357	3,932	11,950	7,916	124,446	4,417	2,574	9,093	5,646	84,819
HONG KONG		6,964	8,402	8,529	10,506	101,408	3,435	5,184	4,150	6,280	51,892
OTHER		8,170	9,364	9,490	13,481	106,529	4,410	5,304	5,296	7,974	59,290
Subtotal:-----		38,376	37,235	62,032	64,850	508,396	20,470	20,720	35,658	36,591	284,807
FR GRPFRT(SEP)	MT										
JAPAN		10,636	10,111	45,411	33,425	242,518	6,141	5,718	29,275	21,118	144,608
EU-15		14,187	11,369	53,626	43,627	140,157	6,256	5,483	24,635	19,114	62,116
CANADA		6,714	5,818	26,110	24,030	72,102	2,510	2,295	11,010	9,967	29,421
FRANCE		4,250	3,559	17,229	14,512	54,680	1,898	1,462	7,945	5,925	24,071
NETHERLANDS		5,277	4,952	22,053	14,522	47,857	2,279	2,767	9,967	6,707	21,251
OTHER		1,771	3,375	5,377	8,721	45,174	1,014	1,885	2,946	6,599	24,090
Subtotal:-----		33,308	30,674	130,524	109,802	499,950	15,922	15,380	67,865	56,798	260,234
FR TANGERINES(NOV)	MT										
CANADA		2,686	2,333	5,097	4,961	13,556	2,304	1,405	4,415	3,625	11,526
KOREA, REPUBLIC		1,232	0	1,232	432	1,232	1,565	0	1,565	382	1,565
JAPAN		0	24	0	24	1,191	0	24	0	24	1,129
OTHER		165	407	317	685	1,140	143	352	282	533	962
Subtotal:-----		4,083	2,763	6,645	6,102	17,118	4,011	1,780	6,262	4,564	15,182

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COMMOOITY ANO COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CANNEO FRUIT											
CND PEACH&NECT(JUN)	MT										
CANADA		437	351	3,059	2,195	5,589	359	356	2,683	2,522	5,285
JAPAN		154	106	2,565	1,230	4,290	175	99	2,718	1,272	4,530
KOREA, REPUBLIC		0	106	1,334	720	2,495	0	89	1,021	611	2,031
TAIWAN		154	53	1,199	774	1,852	125	46	1,052	689	1,649
OTHER		561	312	4,633	3,627	7,068	539	305	4,284	3,588	6,644
Subtotal:-----		1,306	928	12,790	8,546	21,293	1,198	895	11,808	8,683	20,139
CND PEARS(JUN)	MT										
CANADA		383	81	2,965	1,628	5,669	356	107	2,616	1,770	5,086
JAPAN		48	0	378	241	623	42	0	373	231	589
OTHER		124	102	456	445	1,023	116	104	421	392	995
Subtotal:-----		554	183	3,800	2,314	7,315	515	211	3,410	2,393	6,670
CND PNEAPL(JAN)	MT										
JAPAN		69	28	1,130	435	1,130	63	30	1,021	456	1,021
CANADA		85	90	959	1,219	959	77	92	964	1,252	964
EU-15		45	138	855	574	855	37	121	665	509	665
GERMANY		45	0	696	188	696	37	0	532	188	532
MEXICO		3	0	184	130	184	3	0	142	129	142
OTHER		19	114	489	1,067	489	22	94	496	906	496
Subtotal:-----		221	370	3,618	3,424	3,618	202	338	3,288	3,252	3,288
FRT MIXTURES(JUN)	MT										
CANADA		350	431	2,901	4,122	5,531	397	518	3,707	4,918	6,954
PHILIPPINES		65	104	3,092	3,619	4,313	69	136	3,560	4,333	5,012
JAPAN		261	182	2,195	1,703	4,163	296	200	2,616	2,004	4,855
SINGAPORE		472	135	2,708	1,324	3,124	531	136	3,057	1,564	3,495
HONG KONG		243	60	1,945	1,466	2,793	257	69	2,176	1,711	3,192
OTHER		545	510	3,893	3,571	6,342	652	557	4,601	4,389	7,421
Subtotal:-----		1,935	1,422	16,735	15,805	26,266	2,201	1,617	19,717	18,919	30,930
ORIED FRUIT											
ORD RAISINS(AUG)	MT										
EU-15		3,797	4,545	28,041	28,258	56,132	6,491	7,433	44,680	46,655	91,112
UNITED KINGOOM		1,759	2,390	13,287	14,265	27,630	3,059	3,880	20,826	24,128	44,647
JAPAN		1,790	2,643	9,811	13,823	25,038	2,933	4,202	15,509	23,055	39,409
CANADA		711	499	5,402	5,266	10,447	1,346	977	11,045	10,675	21,000
GERMANY		779	405	4,741	3,349	9,210	1,220	635	7,029	5,027	14,128
OTHER		2,749	3,216	13,914	14,712	27,007	4,921	5,575	24,859	25,159	47,596
Subtotal:-----		9,045	10,903	57,168	62,059	118,624	15,691	18,186	96,094	105,544	199,116
ORD PRUNES(AUG)	MT										
EU-15		2,499	2,878	15,302	15,111	34,588	6,075	6,276	36,546	33,390	80,958
JAPAN		743	861	5,592	4,601	13,183	1,557	1,553	12,553	9,534	28,583
GERMANY		716	762	4,299	4,495	11,492	1,661	1,858	10,095	10,104	26,842
ITALY		547	725	3,457	2,651	6,593	1,513	1,845	8,327	6,579	16,373
UNITED KINGOOM		549	618	1,823	2,183	5,489	1,244	1,016	4,065	3,902	11,449
CANADA		358	351	1,746	1,791	4,167	822	728	4,230	4,026	9,782
OTHER		664	1,254	4,351	7,979	9,731	1,221	2,244	9,185	14,695	20,682
Subtotal:-----		4,264	5,344	26,991	29,481	61,669	9,674	10,801	62,514	61,644	140,006
FRUIT JUICES(SSE)											
ORANGE JU CNC (OEC)	KL										
EU-15		11,962	5,765	11,962	5,765	178,160	5,509	2,736	5,509	2,736	56,966
FRANCE		6,178	2,978	6,178	2,978	97,548	3,000	1,486	3,000	1,486	21,915
NETHERLANOS		4,818	583	4,818	583	56,771	1,976	307	1,976	307	22,597
JAPAN		1,236	1,740	1,236	1,740	51,640	1,159	1,100	1,159	1,100	27,038
CANADA		3,071	2,327	3,071	2,327	27,786	4,853	3,993	4,853	3,993	48,285
KOREA, REPUBLIC		684	2,460	684	2,460	20,340	613	1,467	613	1,467	13,907
OTHER		4,199	1,823	4,199	1,823	48,856	1,668	783	1,668	783	20,834
Subtotal:-----		21,152	14,114	21,152	14,114	326,782	13,802	10,080	13,802	10,080	167,031
ORNG JU NTCNC(DEC)	KL										
CANADA		9,603	10,194	9,603	10,194	104,395	6,832	6,700	6,832	6,700	73,021
EU-15		2,822	1,817	2,822	1,817	32,934	1,717	1,214	1,717	1,214	21,197
BELGIUM-LUXEMBOU		960	1,685	960	1,685	21,191	640	1,111	640	1,111	13,507
OTHER		1,637	2,403	1,637	2,403	23,227	1,268	2,027	1,268	2,027	19,518
Subtotal:-----		14,062	14,414	14,062	14,414	160,556	9,817	9,941	9,817	9,941	113,737
GRPFRT JU CNC (OEC)	KL										
EU-15		1,736	1,329	1,736	1,329	31,141	865	856	865	856	17,168
JAPAN		752	1,530	752	1,530	20,693	953	976	953	976	17,238
FRANCE		1,197	118	1,197	118	14,455	415	84	415	84	6,933
NETHERLANDS		331	499	331	499	9,802	401	404	401	404	6,772
ISRAEL		403	0	403	0	5,477	120	0	120	0	1,527
CANADA		194	201	194	201	3,829	307	314	307	314	5,710
OTHER		618	146	618	146	4,369	370	129	370	129	2,905
Subtotal:-----		3,703	3,206	3,703	3,206	65,508	2,615	2,275	2,615	2,275	44,549
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
JAPAN		31	16	33	16	6,276	121	67	135	67	27,674
CANADA		160	178	307	407	4,567	513	561	957	1,207	12,488
SWITZERLAND		0	0	0	0	1,988	0	0	0	0	6,598
EU-15		0	0	91	26	1,304	0	0	148	58	4,194
OTHER		0	21	13	28	209	5	50	29	59	713
Subtotal:-----		191	216	444	477	14,344	640	678	1,268	1,391	51,666
FR ONIONS(OCT)	MT										
CANADA		8,543	8,428	20,656	24,047	103,048	2,921	3,057	7,732	8,558	36,260
JAPAN		13,411	3,423	39,774	19,659	79,476	2,948	776	8,777	4,671	19,360
OTHER		4,550	4,484	18,150	27,175	41,923	1,493	1,835	5,662	10,219	14,119
Subtotal:-----		26,503	16,335	78,580	70,881	224,447	7,362	5,668	22,172	23,448	69,739
CANNEO VEGETABLES											
CND SWT CORN(AUG)	MT										
EU-15		4,922	3,892	19,798	15,589	46,309	3,598	2,493	15,206	10,468	35,341
JAPAN		3,122	4,927	14,764	24,642	45,654	2,358	3,995	11,553	20,836	38,581
TAIWAN		2,254	1,925	8,083	7,210	21,174	2,076	1,840	7,224	7,030	18,564
GERMANY		1,530	1,327	8,069	3,535	18,415	1,152	909	6,346	2,464	14,218
HONG KONG		1,425	2,631	6,672	9,437	17,451	1,150	2,000	5,481	7,866	14,333
UNITED KINGOOM		1,732	1,430	5,912	5,771	13,042	1,240	714	4,543	3,350	10,029
OTHER		2,781	3,018	14,009	17,199	35,753	2,208	2,729	11,425	15,829	29,581
Subtotal:-----		14,505	16,393	63,327	74,575	166,341	11,390	13,058	50,889	62,030	134,401

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COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	QUANTITY CURR MO CURR YR	QUANTITY YR TDT LAST YR	QUANTITY YR TDT CURR YR	QUANTITY LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	VALUE CURR MO CURR YR	VALUE YR TDT LAST YR	VALUE YR TDT CURR YR	VALUE LAST YEAR
FRESH VEGETABLES											
CND TOM PAS(JUL)	MT										
CANADA		2,212	2,082	26,285	30,459	45,326	1,873	1,700	21,951	22,432	37,231
JAPAN		1,206	1,087	5,522	5,442	12,354	1,124	779	4,668	4,268	10,120
EU 15		39	675	101	3,365	6,190	35	338	83	2,075	4,313
KOREA, REPUBLIC		417	882	2,824	2,664	5,908	381	708	2,595	2,154	5,421
ITALY		0	557	0	2,441	5,255	0	270	0	1,326	3,369
OTHER		2,487	3,232	11,875	19,003	17,863	2,185	2,309	8,295	12,982	13,681
Subtotal:-----		6,360	7,958	46,606	60,933	87,641	5,597	5,834	37,592	43,911	70,767
CND TOM SAUCE(JUL)	MT										
CANADA		4,227	4,012	25,209	29,771	54,007	3,777	3,643	23,674	26,894	49,485
JAPAN		614	219	2,864	2,574	6,116	561	269	2,844	3,086	6,143
EU 15		622	506	2,143	2,833	5,305	683	602	2,484	3,468	5,929
OTHER		1,391	1,146	7,130	7,138	14,992	1,560	1,029	7,513	6,700	15,589
Subtotal:-----		6,854	5,882	37,346	42,316	80,420	6,582	5,542	36,515	40,148	77,147
FRZN VEGETABLES											
FZN SWT CORN(JUL)	MT										
JAPAN		3,464	2,194	19,799	18,727	40,120	3,040	2,059	17,800	17,351	35,756
HONG KONG		325	391	1,773	2,820	3,872	218	295	1,346	1,944	2,878
CANADA		215	111	1,191	1,205	3,323	187	90	1,036	1,007	2,852
OTHER		932	1,166	6,950	5,314	11,658	715	873	5,256	4,269	9,012
Subtotal:-----		4,936	3,862	29,712	28,066	58,972	4,161	3,317	25,439	24,570	50,498
FZN F FRY(JUL)	MT										
JAPAN		13,636	14,547	86,090	92,225	183,767	10,128	10,395	62,998	67,738	135,152
KOREA, REPUBLIC		1,680	1,916	8,864	12,954	21,956	1,172	1,336	6,481	9,202	15,721
HONG KONG		1,202	2,009	10,666	13,518	21,136	799	1,329	7,056	8,988	13,999
OTHER		9,584	10,931	65,164	65,238	123,078	7,091	8,357	49,205	48,842	91,407
Subtotal:-----		26,102	29,403	170,783	183,936	349,937	19,190	21,417	125,740	134,770	256,280
TREE NUTS											
ALMONDS UNSH(JUL)	MT										
INDIA		317	737	4,031	7,243	6,323	719	1,765	9,698	17,954	15,128
JAPAN		633	142	3,604	690	4,669	1,991	344	9,904	1,745	12,500
EU 15		179	1,164	2,185	5,351	3,457	430	2,799	5,283	12,306	8,031
GERMANY		51	705	797	1,970	1,178	123	1,686	1,947	4,691	2,883
OTHER		331	489	1,598	3,382	2,331	682	1,233	3,810	8,156	5,655
Subtotal:-----		1,460	2,532	11,419	16,665	16,779	3,823	6,141	28,695	40,161	41,315
ALMND SH/PREP(JUL)	MT										
EU 15		17,845	10,397	87,684	82,771	170,076	51,711	55,159	292,571	389,744	559,077
GERMANY		5,848	3,218	32,439	31,349	62,871	16,071	17,069	114,705	141,630	211,429
JAPAN		4,026	1,857	18,053	11,257	40,454	9,436	10,361	48,313	60,854	93,264
NETHERLANDS		1,240	967	10,196	8,435	20,915	3,196	5,641	26,992	39,101	53,497
FRANCE		2,886	1,366	8,744	8,839	18,587	7,431	7,605	27,941	43,147	57,972
CANADA		1,274	408	9,218	4,975	16,726	2,932	2,059	23,020	23,191	41,184
OTHER		6,235	2,930	32,925	21,429	54,490	14,646	13,983	76,579	100,488	135,794
Subtotal:-----		29,381	15,592	147,879	120,432	281,745	78,725	81,562	440,483	574,277	829,318
WALNUTS SH(AUG)	MT										
JAPAN		1,464	1,135	4,074	3,938	7,676	5,378	5,793	14,501	18,608	31,804
EU 15		820	364	3,468	3,130	5,116	1,350	868	7,282	7,272	11,865
CANADA		275	400	1,126	1,605	2,110	858	1,078	3,952	5,087	7,678
SPAIN		182	66	1,226	1,208	1,794	411	367	2,429	2,759	3,998
ISRAEL		206	194	722	709	1,459	983	884	3,245	3,526	6,776
OTHER		403	451	1,858	2,526	3,931	1,250	1,361	5,522	7,318	12,495
Subtotal:-----		3,168	2,545	11,248	11,907	20,291	9,819	9,984	34,501	41,810	70,618
WALNUTS UNSH(AUG)	MT										
EU 15		1,621	471	46,898	46,821	48,199	3,195	1,062	90,103	101,105	92,596
GERMANY		391	65	14,454	11,773	14,603	706	118	27,637	25,805	27,908
SPAIN		408	122	13,364	14,261	13,877	853	258	24,856	28,943	25,912
ITALY		606	234	9,663	10,201	9,842	1,183	575	18,671	22,700	19,021
NETHERLANDS		117	34	3,975	6,435	4,135	238	72	7,958	14,441	8,223
OTHER		1,035	859	6,527	7,194	9,266	2,054	1,673	13,045	14,931	17,962
Subtotal:-----		2,656	1,331	53,425	54,014	57,464	5,250	2,735	103,149	116,035	110,558
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
BRAZIL		707	376	1,192	900	2,168	3,578	1,299	6,079	3,234	11,226
CANADA		73	31	350	434	1,397	528	264	2,272	2,881	9,232
EU 15		59	97	294	383	628	331	538	1,596	2,544	3,253
JAPAN		20	36	20	56	326	65	143	65	208	1,264
OTHER		117	59	408	146	1,006	348	470	1,538	1,235	4,951
Subtotal:-----		976	599	2,264	1,919	5,524	4,850	2,714	11,550	10,102	29,926
HOP EXTRACT(SEP)	MT										
EU 15		135	180	543	556	1,438	1,956	2,849	7,947	8,438	21,474
MEXICO		44	173	199	288	489	1,314	4,574	5,299	6,780	13,202
GERMANY		27	38	185	131	467	318	709	2,510	1,936	6,539
COLOMBIA		320	0	320	59	345	2,462	0	2,462	1,781	3,144
BRAZIL		19	49	86	223	313	269	206	1,040	2,351	3,624
UNITED KINGDOM		43	8	162	54	300	629	204	2,039	811	3,884
OTHER		129	81	253	280	945	1,924	1,142	4,046	3,770	15,361
Subtotal:-----		644	482	1,399	1,407	3,530	7,925	8,771	20,794	23,120	56,806
HOPS.NSPF(SEP)	MT										
EU 15		211	273	1,474	773	2,279	865	1,168	7,041	3,679	11,478
GERMANY		203	172	1,151	435	1,604	802	660	5,119	1,787	7,204
UNITED KINGDOM		9	81	278	295	605	63	412	1,598	1,712	3,875
MEXICO		0	0	74	0	342	0	0	265	0	2,129
OTHER		96	69	141	144	515	1,383	458	1,936	1,355	4,485
Subtotal:-----		308	341	1,689	917	3,135	2,248	1,626	9,242	5,034	18,092
WINE											
GRAPE WINE(JAN)	KL										
EU 15		5,108	4,707	55,735	72,708	55,735	9,790	9,617	93,678	144,223	93,678
UNITED KINGDOM		3,035	2,062	32,530	37,541	32,530	6,226	4,408	58,288	79,523	58,288
CANADA		1,831	2,643	27,167	32,960	27,167	3,735	5,409	50,421	67,001	50,421
JAPAN		1,170	1,307	16,441	16,753	16,441	1,865	2,034	28,072	28,374	28,072
SWITZERLAND		1,186	819	8,250	8,376	8,250	1,649	1,336	13,023	13,759	13,023
OTHER		2,760	3,086	23,481	29,489	23,481	4,414	5,065	35,122	47,567	35,122
Subtotal:-----		12,054	12,563	131,073	160,284	131,073	21,453	23,461	220,316	300,923	220,316

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
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COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
NEW ZEALAND		0	0	11,332	18,540	49,027	0	0	15,086	17,258	52,798
CANADA		6,280	6,155	44,165	50,953	71,873	2,934	2,691	15,347	17,181	27,528
OTHER		0	0	9,619	9,186	47,829	1	0	5,533	3,021	22,624
Subtotal:-----		6,280	6,155	65,117	78,679	168,729	2,936	2,691	35,966	37,460	102,950
FR PEARS(JUL)	MT										
CHILE		0	0	18	90	33,339	0	0	6	28	15,642
ARGENTINA		0	0	0	0	15,637	0	0	0	0	10,261
OTHER		403	493	1,630	1,555	8,366	446	1,338	4,054	4,110	8,109
Subtotal:-----		403	493	1,648	1,645	57,341	446	1,338	4,060	4,138	34,013
APRICOT (MAY)	MT										
CHILE		938	867	945	929	1,344	1,250	934	1,276	1,048	1,604
NEW ZEALAND		0	0	0	0	310	0	0	0	0	852
OTHER		0	14	6	105	16	0	10	9	263	22
Subtotal:-----		938	881	950	1,033	1,670	1,250	944	1,285	1,310	2,477
PEACH-NEC(MAY)	MT										
CHILE		4,069	6,591	4,237	7,224	40,677	4,352	6,855	4,536	7,595	30,485
OTHER		19	6	251	461	392	23	7	244	417	416
Subtotal:-----		4,088	6,596	4,488	7,684	41,069	4,375	6,862	4,780	8,012	30,901
PLUM-PRUNE(MAY)	MT										
CHILE		1,296	1,828	1,298	2,138	19,665	1,523	2,187	1,529	2,565	16,487
OTHER		31	0	193	190	214	48	0	281	239	310
Subtotal:-----		1,327	1,828	1,492	2,327	19,879	1,571	2,187	1,810	2,804	16,797
FRESH GRAPES (MAY)	MT										
CHILE		13,122	29,657	14,722	33,933	273,685	23,842	63,870	25,043	68,054	250,990
MEXICO		0	0	80,492	59,956	80,569	0	0	82,696	86,724	82,797
OTHER		82	354	2,014	3,662	5,250	148	563	1,375	1,748	4,141
Subtotal:-----		13,204	30,010	97,228	97,551	359,503	23,990	64,433	109,114	156,527	337,929
FR RASPBRY(JAN)	MT										
CANADA		0	0	6,362	4,624	6,362	0	0	11,568	9,071	11,568
OTHER		338	341	1,664	1,783	1,664	998	1,101	5,695	5,433	5,695
Subtotal:-----		338	341	8,026	6,406	8,026	998	1,101	17,263	14,505	17,263
FR STRAWBRIS(JAN)	MT										
MEXICO		707	1,100	25,894	29,434	25,894	1,032	1,497	43,626	52,726	43,626
OTHER		328	283	790	1,096	790	738	932	2,077	2,705	2,077
Subtotal:-----		1,035	1,383	26,684	30,530	26,684	1,771	2,429	45,702	55,431	45,702
FR BANANA(JAN)	MT										
COSTA RICA		78,172	82,852	958,125	970,001	958,125	24,808	25,752	306,323	309,551	306,323
ECUADOR		65,207	71,401	931,548	848,772	931,548	17,642	20,721	256,231	237,818	256,231
OTHER		140,279	133,401	1,774,148	1,958,220	1,774,148	37,569	37,820	499,891	551,071	499,891
Subtotal:-----		283,658	287,655	3,663,821	3,776,992	3,663,821	80,019	84,293	1,062,445	1,098,440	1,062,445
FR MANGO(JAN)	MT										
MEXICO		0	3	114,746	139,261	114,746	0	26	100,600	80,606	100,600
OTHER		2,032	3,639	27,647	32,743	27,647	2,257	3,255	23,031	25,781	23,031
Subtotal:-----		2,032	3,642	142,393	172,004	142,393	2,257	3,280	123,631	106,387	123,631
FR PINAPLE(JAN)	MT										
COSTA RICA		5,745	10,292	76,991	84,142	76,991	1,942	4,795	27,389	34,374	27,389
HONDURAS		2,151	854	33,148	27,084	33,148	588	268	8,972	7,561	8,972
OTHER		823	1,099	12,525	20,842	12,525	252	361	3,234	6,701	3,234
Subtotal:-----		8,719	12,245	122,664	132,068	122,664	2,782	5,425	39,596	48,636	39,596
FR CANTLPE(MAY)	MT										
MEXICO		8,521	11,165	49,799	65,880	130,065	2,993	6,546	16,298	23,226	39,141
COSTA RICA		0	0	5,291	3,210	61,327	0	0	2,133	1,217	28,640
GUATEMALA		10,879	9,444	20,887	17,276	55,075	3,058	2,973	6,144	5,833	15,890
OTHER		11,282	11,628	15,922	17,985	77,095	2,681	2,594	3,816	4,127	20,169
Subtotal:-----		30,682	32,236	91,900	104,351	323,563	8,732	12,114	28,391	34,404	103,840
FR MELON,OT(MAY)	MT										
MEXICO		7,075	9,885	32,367	24,295	55,740	2,508	3,462	11,006	8,330	19,311
COSTA RICA		0	0	970	590	17,027	0	0	391	210	7,408
OTHER		7,443	9,341	12,496	13,400	48,588	3,004	2,722	4,350	4,392	17,302
Subtotal:-----		14,518	19,226	45,833	38,286	121,354	5,513	6,184	15,748	12,933	44,022
FR ORANGES(NOV)	MT										
AUSTRALIA		0	0	0	0	11,550	0	0	0	0	17,652
OTHER		503	602	630	791	11,625	287	339	331	414	4,756
Subtotal:-----		503	602	630	791	23,175	287	339	331	414	22,408
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EU-15		3,037	1,233	32,925	29,080	32,925	3,525	1,220	33,445	31,157	33,445
SPAIN		3,037	1,232	32,892	29,034	32,892	3,525	1,214	33,335	31,017	33,335
CHINA, PEOPLES R		456	1,530	12,593	31,129	12,593	472	1,508	11,638	32,204	11,638
OTHER		122	168	2,196	2,800	2,196	139	200	2,520	3,303	2,520
Subtotal:-----		3,615	2,931	47,714	63,009	47,714	4,136	2,928	47,603	66,664	47,603
CND BLK OLV(NOV)	MT										
EU-15		1,225	1,474	2,508	2,453	13,352	2,708	3,343	5,604	5,646	31,610
SPAIN		1,089	1,275	2,234	2,096	11,459	2,404	2,725	4,992	4,580	26,239
MOROCCO		452	438	854	823	6,347	1,054	879	1,933	1,685	14,563
OTHER		21	4	27	27	162	53	12	65	72	372
Subtotal:-----		1,698	1,915	3,389	3,303	19,861	3,815	4,235	7,601	7,403	46,545
CND GRN OLV(NOV)	MT										
EU-15		2,584	3,116	5,870	6,690	32,529	8,314	8,029	18,335	17,868	94,375
SPAIN		2,571	3,093	5,804	6,629	32,305	8,270	7,961	18,182	17,712	93,667
OTHER		132	127	247	280	1,489	261	225	487	478	2,753
Subtotal:-----		2,716	3,244	6,118	6,970	34,018	8,575	8,255	18,822	18,346	97,128
CND PEACH(JUN)	MT										
EU-15		1,599	2,496	6,569	15,219	10,568	1,094	1,724	4,237	9,992	7,087
GREECE		1,586	1,786	6,506	12,767	10,489	1,064	1,238	4,082	8,208	6,898
OTHER		289	405	2,646	2,659	3,532	210	285	1,860	1,858	2,539
Subtotal:-----		1,888	2,901	9,216	17,878	14,100	1,304	2,009	6,097	11,850	9,626
CND PINAPLE(JAN)	MT										
PHILIPPINES		8,694	9,709	124,605	125,452	124,605	6,037	6,318	72,287	81,542	72,287
THAILAND		3,240	4,507	99,474	78,032	99,474	2,226	2,894	53,336	54,759	53,336
OTHER		5,233	8,142	71,416	93,865	71,416	3,566	6,323	31,492	61,996	31,492
Subtotal:-----		17,167	22,357	295,495	297,349	295,495	11,829	15,534	157,115	198,297	157,115
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		1,426	1,334	7,382	5,900	14,091	2,974	3,770	14,631	15,516	28,562
OTHER		34	87	293	304	533	57	190	953	902	1,576
Subtotal:-----		1,460	1,420	7,675	6,204	14,625	3,031	3,960	15,585	16,418	30,138

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DATES(SEP)	MT										
PAKISTAN		348	329	724	569	3,172	367	302	708	520	3,170
CHINA, PEOPLES R		39	68	79	136	620	65	113	137	208	1,103
ISRAEL		121	23	386	41	522	347	90	751	138	1,088
OTHER		28	24	233	186	338	41	34	417	395	607
Subtotal:-----		537	444	1,423	932	4,652	820	539	2,013	1,260	5,968
DRD FIG(SEP)	MT										
EU-15		2	10	823	1,009	823	8	15	1,919	2,323	1,919
GREECE		0	0	802	973	802	0	0	1,849	2,182	1,849
TURKEY		115	50	478	354	678	165	124	965	809	1,239
MEXICO		20	20	244	306	307	52	48	768	782	916
OTHER		2	5	6	9	45	6	23	15	27	73
Subtotal:-----		139	86	1,551	1,679	1,853	230	210	3,666	3,941	4,147
DRD RAISIN(AUG)	MT										
MEXICO		985	271	5,291	4,718	8,370	854	202	4,404	4,324	7,796
CHILE		120	281	821	1,157	1,724	131	347	946	1,384	2,006
OTHER		229	81	776	361	2,013	247	96	800	412	2,045
Subtotal:-----		1,334	633	6,888	6,236	12,107	1,232	645	6,150	6,120	11,847
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
ARGENTINA		3,864	8,514	131,610	117,992	314,057	1,742	2,195	47,686	38,643	110,229
EU-15		36,712	49,839	100,155	155,786	219,220	16,289	18,504	42,296	56,791	92,527
GERMANY		25,654	37,073	60,492	112,740	159,519	11,684	13,439	26,190	40,652	65,955
OTHER		20,528	81,330	144,543	240,908	305,039	8,914	27,527	53,491	87,333	114,986
Subtotal:-----		61,104	139,684	376,307	514,686	838,316	26,945	48,227	143,472	182,767	317,741
FCOJ(DEC)	KL										
BRAZIL		44,731	103,514	44,731	103,514	703,184	10,922	20,657	10,922	20,657	173,085
MEXICO		6,144	18,202	6,144	18,202	162,610	1,538	4,283	1,538	4,283	47,432
OTHER		4,358	12,072	4,358	12,072	101,815	829	2,877	829	2,877	30,355
Subtotal:-----		55,234	133,788	55,234	133,788	967,609	13,290	27,816	13,290	27,816	250,872
GRAPE JU(JAN)	KL										
ARGENTINA		9,892	6,373	51,315	168,435	51,315	2,424	1,996	12,785	46,329	12,785
CHILE		2,373	1,014	14,711	26,507	14,711	591	689	4,076	8,509	4,076
OTHER		1,483	4,104	22,740	29,522	22,740	616	1,954	9,260	13,707	9,260
Subtotal:-----		13,749	11,491	88,766	224,464	88,766	3,630	4,639	26,121	68,545	26,121
PNEAPL JUCN(JAN)	KL										
THAILAND		6,071	8,930	97,211	103,944	97,211	1,598	2,778	18,019	34,356	18,019
PHILIPPINES		13,246	9,903	114,084	100,644	114,084	2,030	1,876	16,167	17,260	16,167
OTHER		3,985	7,144	26,319	50,206	26,319	1,158	2,441	6,517	16,183	6,517
Subtotal:-----		23,302	25,977	237,613	254,794	237,613	4,786	7,094	40,703	67,799	40,703
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		2,906	4,241	51,400	38,678	51,400	897	1,277	16,003	11,952	16,003
THAILAND		5,452	985	18,013	13,895	18,013	1,558	693	10,398	7,607	10,398
OTHER		42	179	14,794	10,013	14,794	38	119	2,635	2,129	2,635
Subtotal:-----		8,400	5,405	84,208	62,586	84,208	2,492	2,089	29,036	21,688	29,036
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		390	517	390	517	20,599	266	479	266	479	16,703
OTHER		57	43	57	43	283	96	80	96	80	825
Subtotal:-----		448	560	448	560	20,882	362	559	362	559	17,527
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		3,921	2,895	5,128	3,641	18,611	3,147	3,364	4,293	4,141	20,030
OTHER		1	93	29	248	692	2	60	31	192	623
Subtotal:-----		3,922	2,988	5,156	3,889	19,302	3,148	3,424	4,324	4,333	20,653
FR CARROT(OCT)	MT										
CANADA		9,440	9,230	32,905	30,665	67,654	2,744	2,318	8,703	7,234	18,424
MEXICO		2,221	2,452	5,399	6,577	33,599	316	389	795	1,105	5,624
OTHER		112	37	129	80	690	60	10	66	25	250
Subtotal:-----		11,773	11,719	38,433	37,322	101,943	3,120	2,716	9,564	8,364	24,298
FR CABBAGE(OCT)	MT										
CANADA		3,183	2,078	9,921	5,964	28,206	738	417	2,522	1,221	7,631
MEXICO		865	875	3,601	1,956	13,301	173	144	645	312	2,358
OTHER		0	1	0	2	22	0	4	1	8	18
Subtotal:-----		4,049	2,955	13,522	7,922	41,529	911	564	3,169	1,541	10,007
FR CELERY(OCT)	MT										
MEXICO		1,723	1,314	2,986	1,552	23,076	364	305	715	350	4,797
OTHER		14	24	413	861	3,416	18	20	134	292	1,139
Subtotal:-----		1,737	1,338	3,399	2,413	26,492	382	325	849	642	5,936
FR CUCMBR(OCT	MT										
MEXICO		38,974	46,860	76,766	93,002	277,516	7,688	14,259	16,758	28,833	106,236
OTHER		1,801	939	2,584	1,743	18,391	448	340	1,256	1,408	9,372
Subtotal:-----		40,776	47,799	79,349	94,745	295,907	8,135	14,599	18,014	30,241	115,608
FR CAULFLWR(OCT)	MT										
CANADA		0	6	387	216	5,990	0	2	117	95	2,378
OTHER		222	380	222	381	1,012	66	144	66	147	405
Subtotal:-----		222	386	609	598	7,003	66	146	183	242	2,783
FR GARLIC(OCT)	MT										
MEXICO		0	27	92	196	16,715	0	24	85	368	19,521
OTHER		652	273	1,550	947	5,723	701	398	1,720	1,325	7,691
Subtotal:-----		651	300	1,642	1,144	22,438	701	422	1,805	1,693	27,212
FR ONION(OCT)	MT										
MEXICO		10,598	12,794	23,935	28,429	219,900	9,462	10,546	29,940	29,343	126,837
OTHER		3,229	9,382	7,710	18,109	45,365	1,380	3,307	3,240	6,238	18,842
Subtotal:-----		13,827	22,176	31,646	46,538	265,265	10,842	13,854	33,181	35,580	145,679
FR PEPPERS(OCT)	MT										
MEXICO		22,477	27,243	46,651	52,291	243,766	15,535	32,348	29,122	45,439	140,762
EU-15		749	1,045	3,555	5,419	16,915	3,315	2,979	10,510	11,803	42,732
NETHERLANDS		723	1,027	3,451	5,329	16,601	3,197	2,931	10,162	11,596	41,735
OTHER		490	790	2,054	2,304	8,876	1,294	1,467	3,762	3,697	15,908
Subtotal:-----		23,717	29,077	52,260	60,014	269,558	20,144	36,794	43,394	60,939	199,403
FR SEED POT(OCT)	MT										
CANADA		7,165	5,093	13,423	10,941	136,546	1,048	872	2,008	2,365	26,550
OTHER		26	0	26	0	89	13	0	17	0	58
Subtotal:-----		7,191	5,093	13,449	10,941	136,635	1,061	872	2,024	2,365	26,607
FR TBL POT(OCT)	MT										
CANADA		33,806	21,126	104,762	64,816	353,273	7,285	3,893	21,109	12,175	71,973
OTHER		0	0	0	0	0	0	0	0	0	0
Subtotal:-----		33,806	21,126	104,762	64,816	353,273	7,285	3,893	21,109	12,175	71,973

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
DEC 1996

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH VEGETABLES											
FR TOMATO(OCT)	MT										
MEXICO		53,291	53,431	113,001	121,227	677,452	52,742	32,753	86,804	71,277	595,875
OTHER		1,964	2,613	5,748	10,051	47,170	4,594	6,000	11,194	19,212	84,102
Subtotal:-----		55,255	56,045	118,749	131,278	724,621	57,335	38,753	97,998	90,489	679,977
FR ASPARG(OCT)	MT										
MEXICO		515	598	1,201	1,325	18,317	1,177	1,730	2,645	3,514	32,841
PERU		1,993	2,259	5,448	5,944	10,048	3,304	3,835	10,132	9,985	18,802
OTHER		605	465	3,233	3,815	4,969	908	830	3,749	4,563	6,513
Subtotal:-----		3,113	3,322	9,882	11,084	33,333	5,389	6,395	16,526	18,062	58,156
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
MEXICO		0	0	3	0	7,987	0	0	2	0	5,149
ISRAEL		79	80	2,037	2,861	3,549	64	67	1,684	2,465	2,929
CHILE		54	127	2,001	273	2,349	47	88	1,490	195	1,810
OTHER		178	218	847	731	1,351	182	247	849	780	1,373
Subtotal:-----		311	426	4,887	3,865	15,236	293	402	4,025	3,440	11,261
CND TOM SAUCE(JUL)	MT										
EU 15		724	500	3,272	3,235	6,605	960	1,023	3,896	4,987	9,995
CANADA		394	286	5,598	2,151	10,790	302	309	3,879	2,038	7,386
SPAIN		160	241	659	1,090	2,038	549	864	2,262	3,783	7,081
OTHER		461	523	4,122	1,965	6,222	461	531	3,896	2,430	5,395
Subtotal:-----		1,579	1,309	12,993	7,351	23,616	1,723	1,862	11,671	9,455	22,776
CND TOMATO(JUL)	MT										
ISRAEL		683	101	14,710	2,895	19,674	406	51	9,136	1,582	11,947
EU 15		1,973	4,669	9,413	18,844	20,409	582	1,973	2,569	7,136	5,747
CHILE		720	213	7,236	3,176	11,725	372	118	3,335	1,557	5,569
ITALY		1,973	4,123	9,229	17,469	19,475	582	1,728	2,501	6,639	5,508
OTHER		746	515	2,271	3,437	6,871	365	232	1,078	1,705	3,479
Subtotal:-----		4,123	5,498	33,630	28,352	58,679	1,724	2,374	16,119	11,980	26,743
CND MSHROOM(JUL)	MT										
CHINA, PEOPLES R		1,029	4,200	11,656	18,854	23,912	2,208	5,965	25,211	29,072	46,720
INDONESIA		1,379	1,166	7,640	7,271	14,579	3,424	2,506	19,517	16,022	35,124
OTHER		1,814	1,244	10,487	8,336	18,725	4,026	2,425	24,921	17,577	43,290
Subtotal:-----		4,222	6,610	29,784	34,461	57,215	9,658	10,896	69,649	62,671	125,134
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		11,564	12,779	51,054	49,288	160,546	6,294	7,926	27,959	30,360	86,277
GUATEMALA		1,808	2,588	9,931	9,934	22,464	1,525	1,856	7,726	7,190	16,479
OTHER		0	6	23	26	67	0	7	9	29	48
Subtotal:-----		13,372	15,373	61,008	59,247	183,077	7,819	9,788	35,694	37,579	102,804
FZN CAULFLR(SEP)	MT										
MEXICO		2,947	3,763	9,333	9,885	16,387	1,749	2,930	5,635	7,437	10,062
OTHER		184	250	768	723	1,847	146	204	536	565	1,331
Subtotal:-----		3,131	4,013	10,100	10,608	18,234	1,895	3,134	6,171	8,002	11,393
FZN POTATO(SEP)	MT										
CANADA		15,783	24,907	54,468	81,118	178,331	9,258	14,885	32,735	49,271	109,287
OTHER		26	40	53	132	283	39	40	87	164	407
Subtotal:-----		15,809	24,947	54,521	81,250	178,614	9,297	14,925	32,822	49,435	109,693
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
TURKEY		30	113	165	157	230	78	412	429	589	609
OTHER		0	0	8	0	54	0	0	12	2	162
Subtotal:-----		30	113	173	158	284	78	412	441	591	771
CASHEW NUT(AUG)	MT										
INDIA		2,120	1,585	12,286	13,619	27,355	10,493	8,112	58,720	70,235	134,902
BRAZIL		1,753	1,848	8,775	10,432	25,018	8,666	8,553	43,203	48,678	121,183
OTHER		254	512	1,923	3,256	5,085	1,160	2,004	8,784	13,874	22,976
Subtotal:-----		4,128	3,945	22,984	27,307	57,458	20,318	18,669	110,707	132,787	279,061
FILBERTS(AUG)	MT										
TURKEY		232	693	1,994	1,719	4,395	865	2,575	7,308	6,120	14,816
OTHER		5	48	549	190	658	24	99	708	394	1,142
Subtotal:-----		237	740	2,542	1,909	5,053	889	2,675	8,016	6,514	15,958
PECANS NSH(SEP)	MT										
MEXICO		8,524	4,597	15,189	10,617	20,122	12,050	4,796	21,924	10,779	27,608
OTHER		0	0	0	0	0	0	0	0	0	0
Subtotal:-----		8,524	4,597	15,189	10,617	20,122	12,050	4,796	21,924	10,779	27,608
WINES											
CHMP&SPRK WN(JAN)	KL										
EU 15		2,085	2,510	29,944	30,385	29,944	20,076	25,203	288,832	318,821	288,832
FRANCE		726	938	9,930	11,031	9,930	14,093	17,667	200,949	224,963	200,949
ITALY		552	769	11,200	10,753	11,200	2,347	3,708	50,900	55,160	50,900
OTHER		20	43	277	247	277	84	127	1,051	863	1,051
Subtotal:-----		2,106	2,552	30,222	30,632	30,222	20,160	25,330	289,884	319,684	289,884
FT&VERM WN(JAN)	KL										
EU 15		863	1,407	13,386	15,474	13,386	4,039	7,056	58,756	76,142	58,756
PORTUGAL		119	262	1,761	2,716	1,761	1,588	3,101	18,828	32,142	18,828
ITALY		369	620	7,204	8,336	7,204	864	1,702	17,526	22,128	17,526
SPAIN		299	359	3,466	3,043	3,466	1,265	1,526	16,754	14,405	16,754
OTHER		28	23	381	366	381	104	103	1,568	1,807	1,568
Subtotal:-----		891	1,429	13,766	15,840	13,766	4,143	7,159	60,324	77,949	60,324
OTH GP WINE(JAN)	KL										
EU 15		13,275	17,906	177,249	214,002	177,249	54,157	70,119	662,411	806,099	662,411
FRANCE		4,283	6,263	60,100	80,993	60,100	26,917	32,987	340,241	388,699	340,241
ITALY		7,286	9,390	94,502	108,258	94,502	20,653	29,443	245,296	328,256	245,296
OTHER		4,762	8,050	51,104	89,550	51,104	11,669	18,669	128,815	214,316	128,815
Subtotal:-----		18,037	25,957	228,353	303,552	228,353	65,826	88,788	791,226	1,020,415	791,226
OTH WN PROD(JAN)	KL										
JAPAN		87	124	1,599	1,708	1,599	353	510	7,428	7,753	7,428
EU 15		395	347	5,180	5,319	5,180	568	466	6,959	6,386	6,959
UNITED KINGDOM		178	157	2,711	2,744	2,711	200	153	3,340	2,677	3,340
OTHER		255	160	1,998	2,251	1,998	338	229	2,857	2,905	2,857
Subtotal:-----		737	632	8,777	9,277	8,777	1,259	1,204	17,244	17,045	17,244
CUT FLOWERS											
ROSES(JAN)	NONE										
COLOMBIA		0	0	0	0	0	6,897	6,223	99,585	119,624	99,585
ECUADOR		0	0	0	0	0	2,562	2,339	27,952	36,518	27,952
OTHER		0	0	0	0	0	1,000	1,053	24,604	22,781	24,604
Subtotal:-----		0	0	0	0	0	10,459	9,614	152,141	178,923	152,141
CARNATIONS(JAN)	NONE										
COLOMBIA		0	0	0	0	0	10,504	10,101	109,471	121,204	109,471
OTHER		0	0	0	0	0	426	434	3,995	5,441	3,995
Subtotal:-----		0	0	0	0	0	10,930	10,535	113,466	126,646	113,466

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